Jumet FINANCIAL

Let's build your future together!

621 7th Avenue, Beaver Falls, PA 15010
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Retirement Plan Operations Associate – Full Time

Jumet Financial is committed to providing our clients with well-informed, personalized advice, and to create a disciplined framework within which financial decisions are made, implemented, and managed from generation to generation. Jumet Financial is seeking a highly efficient and detail-oriented individual with the same strong standards for the role of Retirement Plan Operations Associate with the potential to grow into a Retirement Plan Operations Advisor. The position requires a high level of confidentiality and professionalism, excellent time and project management skills, and the ability to manage multiple work streams (both internal and external) at once. The qualified candidate must show high regard for client needs and not only be efficient, but also build rapport with current clients and prospective clients. The individual will have a desire to continue their education and skill development toward managing and building a 401(k) Plan Team.

Primary Duties and Responsibilities:

- Assist with the communication and administrative duties involved in the onboarding of new 401k plans
- Participate in team meetings and support staff meetings – in particular, involving the ongoing development and support of the Retirement Plan division
- Aid in the growth and development of our Retirement Plan Division
- Assist advisor in preparing educational materials
- Assist with reviewing plan data to assure ongoing compliance and testing adherence
- Help to perform tasks necessary to the ongoing maintenance of the plan, including plan events and investment performance reviews
- Assist the advisor with coordinating onsite visits of plan sponsor(s) where the advisor will further encourage participant enrollment and provide plan education
- Deliver outstanding client service, relating to general client support and answering general questions about accounts as needed
- Other assigned duties from management
- All Jumet Financial employees are required to help serve our community through initiatives planned by the Jumet Financial Team

Qualifications:

- Associates or bachelor's degree in progress or in a finance related field and willingness to continue education towards certifications and/or advanced degrees
- Strong passion to work in and succeed in the financial industry
- Willingness to obtain the Series 7 & 66 and other required registrations promptly to become an advisor
- Excellent Computer skills (MS Word, Excel, PowerPoint, and Outlook)
- Excellent communication skills (spelling, grammar and proofreading) written skills and verbal skills
- Excellent organizational and time management skills
- Ability to prioritize and multi-task
- Ability to exercise confidentiality and discretion

Eligible candidates will be required to pass a thorough background check.

All qualified candidates should email resumes to careers@jumetfinancial.com