

Retirement Plan Adjustment Specialist

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Company: SS&C Technologies Holdings

Location: United States

Category: business-and-financial-operations

Job Description

Title: Retirement Plan Adjustment Specialist

Location: Remote - California, Connecticut, Massachusetts, Maine, Missouri, New Jersey, New York, Tennessee, Virginia - ONLY

Get To Know The Team:

[REDACTED] Retirement Specialist provides support to Operations and other specialized groups by researching and resolving discrepancies pertaining to retirement plan/participant accounts transactions. Discrepancies may pertain to improper balancing of payroll rosters, mismatched transactions, etc.

Why You'll Love It At SS&C!

Flexibility: Hybrid Work Model & Business Casual Dress Code, including jeans

Your Future: Generous 401(k) Matching Program, Tuition & Professional Development Reimbursement Opportunities.

Work/Life Balance: Unlimited Personal & Vacation Time Off, Sick Leave Policy, Paid Company Holidays

Your Well-being: Medical, Dental, Vision, Life Insurance, Short & Long-Term Disability, Global Employee Assistance, Parental Leave, and more

Diversity & Inclusion: Committed to Being an Organization that Welcomes, Celebrates,

and Thrives on Diversity

Training: Hands-On and Customized by your Team, including Technical and E-Learning Resources

Extra Perks Discounts on fitness memberships, cell provider, childcare, travel, and more!

What You Will Get To Do:

Investigates research requests generated from multiple sources, such as plan sponsors, participants, fund companies, third-party administrators for assigned clients. Obtains all appropriate backup documentation using imaged documents, microfiche, and archived records in order to trace issues to their source.

Determines need for adjustment and whether correction involves outside party indemnification. Makes adjustments typically involving shorter timeframes of research and corrections.

Discusses correction/settlement with request originator. Prepares documentation including form correspondence in cases where external parties need notifying.

Generates a variety of daily reports and reviews for discrepancies (kickers) that need research and correction. Works with Control Department and other internal groups to resolve open items.

Acts as liaison between multiple clients under time-sensitive deadlines in order to minimize potential "as-of" loss exposure.

The Impact You Will Make:

Solid knowledge of qualified retirement plans or mutual fund processing required. Knowledge of adjustment procedures also required.

Analytical and follow through skills required for researching information and finding solutions to pending items and discrepancies. Numbers aptitude is required.

Organization, attention to detail and accuracy are required in order to research and reconcile transactions on a timely basis.

Ability to communicate clearly in order to resolve discrepancies using internal as well as industry standard terminology.

Customer service orientation; acts as liaison between clients and internal groups.

Some college or equivalent combination of formal education and work experience required.

12-18 months previous experience in retirement plan administration required.

Knowledge of TRAC 2000 preferred.

California, New York, & Jersey City, NJ:

Salary Range for Position is expected between \$50,000 and \$60,000. The successful candidate may be eligible for an annual discretionary incentive compensation award.

Disclaimer: The salary, other compensation, and benefits information is accurate as of the date of this posting. SS&C reserves the right to modify this information at any time, subject to applicable law.

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Cross References and Citations:

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