ROBERT SMITH

Pension Specialist

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Experienced in commercial banking, sales, risk management, and working the front-line and interacting with mid-market clients, whose revenue range from $5-100 million. I am interested in sales or business development positions.

EXPERIENCE

Pension Specialist

ABC Corporation - AUGUST 2015 – JANUARY 2016

- Responsible for the day-to-day service and administration of benefit plans for assigned clients using established procedures and detailed instructions.
- Performed benefit calculations where required.
- Maintained benefits member database Provide basic advice and guidance to clients or plan members.
- Assisted employees in the completion of appropriate forms, calculation of benefits or premiums.
- Liaised with actuarial staff, senior consultants or senior administrator/manager, as well as a trust company and insurance company representatives Work on assignments requiring considerable judgment and initiative.
- Understood implications of work and makes recommendations for solutions.
- Responsible for research and resolving inquiries received from Ford Motor Company retirees, and alternate payees, as well as Fidelity Investments regarding first check dates, overpayments, or underpayments due to Qualified Domestic Relations Orders not being applied.

Pension Specialist

Delta Corporation - 2014 – 2015

- Designed queries in Access and searched on targeted data in Excel to review customers historical data Generously assisted team members on complex .
- Manage a high volume of incoming calls from healthcare participants about their pension plans -Educate and counsel potential retirees on information .
- Calculated retirement benefits for a single client with approximately 200,000 participants.
- Consulted potential and current retirees over various networks on pension options.
- Educated clients on pension benefits and explained early retirement decisions Identified client engagement opportunities through active

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listening .
- Accurately and efficiently responded to customers request and assisted shareholders, associates, and vendors via phone and email Entered and updated .
- Secured, processed, and disseminated dividend checks work over $100k.

EDUCATION

- BS In Life Science

SKILLS

Customer Service, Inside Sales, Medical Insurance Benefits, Pension Specialist, Medicare Specialist, Employee Benefits, HR ONBOARDING.