

ROBERT SMITH

Sr. Retirement Specialist

Phone: (0123)-456-789 | Email: info@qwikresume.com | Website: Qwikresume.com

SUMMARY

Versatile, dependable and efficient with 4+ years experience in customer service, sales, and financial advice. An expert in enhancing business value and leading strategic market research in the pursuit of venture capital initiatives and highly effective mergers and acquisitions.

CORE COMPETENCIES

Program Management, Performance Analysis, Database Administration, Due Diligence, Budget Management.

PROFESSIONAL EXPERIENCE

Sr. Retirement Specialist ABC Corporation - 1998 – 2009

Key Deliverables:

- Coached clients and employees to understand retirement plan documents and calculations.
- Researched plan to ensure proper receipt of total retirement benefits.
- Conducted counseling sessions regarding the retirement process and procedures.
- Processed retirements, terminations, payroll adjustments, pension payments, death notification, and corresponding benefit payoffs.
- Assisted in the development and implementation of survivor support training materials.
- Validated and confirmed post-retirement eligibility based on years of service.
- Provided support concerning medical and dental insurance; fitness programs, leaves of absence, termination, severance, benefit appeals, workers compensation, payroll by phone.

Retirement Specialist Aon Hewitt - 1994 – 1998

Key Deliverables:

- Prepare and file Government Form 5500s and Summary Annual Reports.
- Act as Client Relationship Manager between both internal and external vendors and clients, gathering data needed to prepare benefit filings and meeting deliverables.
- Research and analyze data received based on knowledge of the specific areas to ensure the quality of the data received.
- Review and analyze trust statements and audits related to benefit plan filings.
- Ensure the client is in compliance with government regulations, company policies and professional practices.
- Respond to ad hoc client demands and administrative/compliance support.

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- Ensure all records and updates are properly documented and communicated.

EDUCATION

Bachelor of Science in Business Management - (University Phoenix)

