

Robert Smith

Retirement Specialist

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SUMMARY

Seeking to secure a career with a growth-oriented organization that will utilize education, experience, and ability to impact long-term business priorities of the company.

SKILLS

MS Office Suite, Project Management, Office Administration, Data Entry.

WORK EXPERIENCE

Retirement Specialist

ABC Corporation - 2002 - 2004

- 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.
- Ensure all records and updates are properly documented and communicated.
- Helped clients develop an investment profile by addressing concerns related to risk and time horizons.

Retirement Specialist

ABC Corporation - 1997 - 2002

- Accountable for the administration and management of the Retirement Plan programs including 401(k), Employee Stock Purchase Plan and Pension.
- Interpreting and communicating the retirement plans policy and guidelines.
- Running reports for Accounting and branch office locations.
- Conducting Payroll audits by researching and processing data updates in the HR/Payroll shared system.
- Collaborating with third-party administrators to resolve escalated inquiries.
- Administering a frozen pension plan; populating benefits calculation estimates, communicating payment options, setting up the pension payments, and auditing monthly payment reports.
- Ensuring all plans maintain legal compliance.

EDUCATION

Diploma in Business - 1989(Washington & Lee High School Montross - Montross, VA)