

## Job Posting

**Position:** Account Representative – Pension  
**Department:** Client Services – Pension  
**Classification:** Exempt  
**Location:** Omaha, NE

A&I Benefit Plan Administrators, Inc.(A&I) is a women-owned, leading Third Party Administrator headquartered in Portland, Oregon. Founded in 1954, A&I now provides services to over 76,000 employees and their families. A&I's mission is to provide personal, responsive quality service at a competitive price.

A&I is a hands-on administrator that lives up to our company tagline: ***Small enough to know you, big enough to serve you.*** As part of our team, you will be instrumental in delivering high-touch service to plan participants, Trustees and plan professionals. Our office is located on the IBEW/NECA campus located at 8946 L Street, Omaha, NE, 68127.

### Position Overview

The Account Representative will maintain client relationships, provide front line customer service and perform a full range of benefit administration duties related to the pension plans. This position requires extensive knowledge of employee benefit Plan administration including retirement plans (defined contribution, defined benefit pension and 401(k). Work has a significant impact on company revenues, client retention, and client perception.

### Position Duties Include (but are not limited to):

1. Provide exceptional customer service to clients, plan participants, employers, providers and vendors and serve as the primary contact in the area of Pension plan administration and services;
2. Assist plan participants with questions about benefits including in-person, by phone and in writing;
3. Process retirement applications, Qualified Domestic Relations Orders, loans and benefit calculations;
4. Perform advanced and complex, administrative duties of central importance to the company requiring the use of simple office machines and independent judgment,

analysis and detailed knowledge of company and/or department procedures related to work performed;

5. Prepare correspondence with clients, plan participants, employers, providers and vendors, that is accurate, timely, and that expresses the company's position with respect to a variety of issues;
6. Provide timely and accurate entry and maintenance of member pension plan documents including applications and verifications;
7. Collect and post contributions, including reciprocity and delinquency management;
8. Collect and post contributions, including reciprocity and delinquency management;
9. Prepare and distribute participant and client communications including letters, e-mails, phone calls and legal notices;
10. Attend participant meetings;
11. Prepare for and attend Trust meetings as well as communicate and coordinate follow up items;
12. Assist with financial functions for pension plans including process accounts receivable payments, benefit payments and deposits, accounts payable, payroll and time loss benefits;
13. Service and support appropriate vendor and business partner relationships (such as prescription provider, attorneys, consultants, etc.);
14. Generate and distribute reports;
15. Maintain client websites; and
16. Additional duties as assigned.

#### **Required Qualifications**

1. Bachelor's Degree (or equivalent work experience) in relevant field;
2. Working knowledge of employee benefit plans and regulations (including health, defined benefit, defined contribution and 401(k) administration);
3. 2-4 years experience in employee benefit plan administration; and
4. Minimum of 2 years pension experience including: Taft-Hartley defined benefit, defined contribution and 401(k) administration.

#### **Proven Skills regarding**

1. Overall customer service;
2. Ability to analyze situations and make appropriate recommendations;
3. Knowledge and application of benefit plan rules and providing retirement plan
4. Services (Taft-Hartley experience a plus);
5. General working knowledge of various industry vendors, their role in plan administration;

6. Ability to participate in and lead team with implementation of new clients and renewal of existing clients;
7. Ability to provide ongoing troubleshooting, problems solving and customer service;
8. Facilitate governmental filings;
9. Keyboarding (demonstrated ability to type quickly and accurately);
10. Experience at intermediate level with MS office suite including in
11. Word/Outlook/Excel;
12. Excellent verbal, written, and phone communication skills;
13. Intermediate level typing and 10-key abilities including accuracy;
14. Good basic math skills including ability to calculate benefits;
15. Maintaining complicated and detailed records and file organization paper/electronic);
16. Proficient at handling and prioritizing multiple tasks;
17. Ability to work independently and under general supervision;
18. Contributes to a positive work environment by communicating in a professional and
19. positive manner (avoids negativity and gossip);
20. Detail oriented, fast paced, flexible, team player;
21. Ability to ask clarifying questions to complete tasks in the most efficient manner
22. possible;
23. Ability to frequently lift/move boxes with a weight of 30 lb or less;
24. Ability to sit for long periods of time;
25. Creating, improving and using administrative systems and procedural checklists; and
26. Ability to follow policies, procedures and guidelines.

### **Preferred Qualifications**

1. Health plan administration experience.

### **Successful Candidates will have Attributes and Values Important to A&I**

1. Maintains confidentiality;
2. Integrity;
3. Honesty;
4. Takes Initiative;
5. Takes pride and ownership of work product;
6. Reliable and is accountable for themselves and their work;
7. Responsive and follows through;
8. Work ethic (attitude and willingness to work and deliver timely and quality work);
9. Demonstrates flexibility;
10. Punctual including excellent attendance record;
11. Respectful and courteous;

12. Cooperative;
13. Organized;
14. Proven ability to prioritize work and multitask;
15. Attention to detail/quality/accuracy;
16. Solution oriented; and
17. Excellent time management skills (able to prioritize and meet deadlines).

**Benefits package for full-time employees**

A&I is a benefits company who believes in the value of employee benefits. As such we offer an exceptional package including:

1. Medical, Dental and Vision Insurance;
2. Group Life Insurance;
3. Exceptional Pension Plan and 401(k) Plan with employer match; and
4. Much more.

**How to Apply:**

For more information about our company, please visit [www.aibpa.com](http://www.aibpa.com). To apply submit resume and salary requirements to [aibpa@seemore.monster.com](mailto:aibpa@seemore.monster.com) and include posting #PENOM14