Job Description

APC
Associated Pension Consultants

Job Title: Distribution & Alliance Administrator I
Department: Operations
Reports To: Distribution & Alliance Manager
Location: Chico, CA

PURPOSE SUMMARY
Responsible for preparing, reviewing, and processing participant distributions, loan requests, automatic rollovers, and the maintenance & administration of our Alliances; while ensuring transactions and all tasks are accurate and processed efficiently in a professional manner.

ESSENTIAL DUTIES AND RESPONSIBILITIES
- Review Distribution Notices and Online Requests for participant distributions, loans, and automatic rollovers.
- Verify participant eligibility, vesting, and plan provisions on all transactions; prior to preparing or processing.
- Prepare and send all necessary paperwork to participant and/or employer in response to the participant request.
- Perform quality control to verify that all applicable policies and legal requirements are adhered to with processing all requests.
- Serve as a client, participant, consultant, and Alliance contact; handling phone calls and written correspondence in a professional manner.
- Document all pertinent client, participant, Consultant, investment provider conversations in APC Gold and under the pertaining participant in WIP.
- Receive requests for Automatic Rollovers, adhere to plan provisions and enter requests into APC applicable programs, uploading information and monitoring the entire participant automatic rollover distribution process.
- Assist Alliance Manager with preparation, review, and completion of alliance forms, while confirming APC Alliance Files and Records are accurate.
- Track all work in WIP, Time tracker and APC Gold programs.
- Review reports and process timely year-end vesting to the Alliances.
- Review Alliance Reports and assist with special projects as assigned.
- Maintain satisfactory attendance.

AUXILLARY DUTIES AND RESPONSIBILTIES
- Perform/coordinate all tasks necessary to support any recommendations regarding any proposed changes related to the handling of participant distributions and loans.
- Participate in group or individual discussions regarding department processes.
- Research solutions to administrative and consulting questions.
- Other duties as assigned.

KNOWLEDGE – SKILLS – ABILITIES
- Skilled in professional customer service techniques with strong problem solving skills.
- Ability to concentrate, be highly organized, and detail oriented.
- Ability to work efficiently, accurately and independently with minimal supervision.
- Ability to interpret complex information and utilize resources to complete assigned tasks.
- Ability to research and propose accurate and detailed solutions to administrative questions.
- Ability to speak, read, write and communicate effectively in English.
- Ability to pass the NIPA Distribution Administrators course.

MINIMUM QUALIFICATIONS

- Bachelors Degree desired (preferably in Business Administration) or equivalent experience.
- Two years *(minimum)* administrative/professional experience which includes customer service *(highly preferred in the banking/financial, legal or insurance service fields);*
  OR one year pension experience.
- Proficiency in MS Applications predominately MS Word and Excel.

PHYSICAL / ENVIRONMENTAL CHARACTERISTICS

Work is performed primarily in an office environment and requires:

- Sitting or standing for prolonged periods of time using a computer keyboard, mouse, and screen.
- Standing and walking may require twisting, reaching, bending, crouching and kneeling.
- Grasping, pushing, pulling, dragging and lifting boxes of files and other office items weighing 30 pounds or less.
- Mobility, vision, hearing and dexterity levels appropriate to the duties to be performed.