



Title: Account Manager

Company: The Pangburn Group

Location: New Roads, Louisiana

Position: Full-time

Education Requirements: Bachelors Degree in Business or related field

Overview of the Position: To manage client relationships by processing transactions in a proprietary database system, preparing and auditing client reports, maintaining participant and client web accessibility, and providing compliance support to clients and brokers in an effort to accurately maintain and administer executive nonqualified executive retirement plans.

Duties:

- Gather and process data necessary for plan maintenance, such as contribution data, policy values data, and participant account data.
- Audit and process transactional data (e.g., plan contributions, participant reallocations)
- Manage client relationships
- Prepare scheduled and ad hoc reports to clients and brokers
- Maintain and monitor participant and plan sponsor access to information online
- Educate clients and brokers about plan parameters, regulations, and processes
- Monitor and facilitate the annual enrollment process for clients
- Maintain accuracy of deemed investment funds used for plan valuation
- Monitor upcoming distributions from plans and prepare reports for events such as termination, death, disability, fixed payout, etc.
- Assist client and brokers with plan documentary and operational compliance with IRS regulations

Desired Skills:

- Proficiency in Excel, Word, and PowerPoint
- Ability to prioritize and perform multiple tasks simultaneously by establishing priorities, planning ahead, and anticipating issues in order to meet deadlines and client expectations.
- Ability to pay careful attention to detail and to accuracy of work, stay organized, and ensure that all reporting meets client expectations.
- Ability to work independently in a self-directed manner
- Strong customer relation skills with the ability to foster and maintain client/broker relationships

About the Company: The Pangburn Group is a privately-owned, fee-for-service, nonqualified executive benefit plan third party administrator operating on a national basis. The Pangburn Group combines experience with technology to bring state-of-the-art plan administration to its clients.

Contact Info: Email your resume to jobs@pangburngroup.com

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