MEZRAH
CONSULTING

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Account Manager

Job Description

National financial consulting firm seeks candidate to provide world class service to clients demonstrating a complete understanding of their plans, and our administration commitments. The candidate will be responsible for identifying ways to improve service and the client's plan performance.

Ideal candidates will thrive in a fast paced entrepreneurial environment. Strong organizational skills will provide the platform for managing multiple tasks, prioritizing work and meeting client deadlines. They will be resourceful in acquiring both information and the knowledge required to be successful.

Responsibilities

Successfully complete all tasks associated with the administration of client plans. This includes, but is not limited to the following: invoicing, processing data such as payroll, fund reallocations, correspondence, phone inquiries, reports and website updates.

Organizing and coordinating the annual enrollment process for each corporate client including the process for enrolling people throughout the calendar year.

Working with financial analysts to confirm plan design information and working with them on re-projections of values and financial models for both corporate and individual clients will be the primary focus of this responsibility.

Job Requirements

- Bachelors Degree (Accounting, Finance, or Economics)
- 2-3 years of experience in the financial services industry
- Strong attention to detail (this will be tested)
- Effective verbal and written communication skills
- Ability to organize, prioritize and manage multiple tasks
- High work standards
- Excel 2003 skills (this will be tested)

Preferred

- 3-5 years of experience in the financial services industry OR experience with non-qualified executive benefit plans
- Experience with life insurance products