



Client Relationship Coordinator

Unique and challenging opportunity to become proficient in recordkeeping retirement plans that are designed for top executives within private and public companies across the United States. We do not expect applicants to have specific experience in this field as it is a very unique, niche market. Employees are provided regular, formal on-the-job training. An ideal applicant will be analytical and detail-oriented, self-motivated, have an aptitude and willingness to learn, and possess a strong desire to succeed.



The Pangburn Group has been named to the Baton Rouge Business Report's Best Places to Work for 7 consecutive years, most recently being named #2 on the list. It is through engaged employees, interesting client relationships, great benefits, flexible work environment, and a dynamic culture balancing hard work and fun (e.g., seafood boil, scavenger hunt, parties), that we have gained this distinct honor. If you are looking for a challenge and a great environment to call home, this is a unique opportunity not to ignore.

Education Requirements: Bachelor or Associate degree or equivalent work experience.

Position Overview: Responsible for assisting and supporting Consultants and Client Relationship Managers with plan onboarding and maintenance in order to improve overall client experience and general client deliverables.

Duties:

- Assist and support Consultants and Client Relationship Managers with:
 - new client and new plan onboarding
 - quality control and timely delivery of Pre-Purchase Analysis
 - client and advisor follow up
 - assist with password resets
 - assist with maintaining contact database
- Monitor and update the system for onboarding of new clients to ensure an accurate status of prospective client progress
- Ensure all pertinent data received is saved, organized, and properly executed and processed
- Assist with supplemental invoicing as needed
- Utilize systems to ensure client/plan maintenance is performed timely
- Organize and maintain marketing materials for new business purposes
- Ensure all work completed includes timely and accurate notes in shared system
- Serve as liaison between Client Relations and Operations Units

The Pangburn Group is an equal opportunity, at will employer and will not tolerate discrimination or harassment on the basis of race, color, creed, religion, age, sex, veteran status, sexual orientation, marital status, medical condition, physical or mental disability or any other basis protected under applicable federal, state, or local law.

Required Skills:

- Demonstrate excellent written and verbal communication skills.
- Proficiency in Microsoft Excel and Word
- Ability to prioritize and perform multiple tasks simultaneously by establishing priorities, planning ahead, and anticipating issues in order to meet deadlines and client expectations
- Detail oriented
- Maintain an organized approach to duties and responsibilities
- Strong customer relation skills with the ability to foster and maintain an effective team environment
- Self-motivated with the ability to work independently