



## **Client Relationship Manager II**

*Daily Valuation Plans  
The Pangburn Group*

**Education Requirements:** Bachelor's degree in Business, Finance, Economics, Accounting, Math or equivalent

**Location:** Headquartered in New Roads, Louisiana; Remote and/or hybrid work is available

**Experience:** 5+ years' experience in nonqualified plan administration; Proficiency in IRC Section 409A rules and regulations.

### **Duties:**

- Develop and maintain client and advisor relationships in line with Pangburn's servicing model.
- Answer participant questions regarding, but not limited to, plan design, website navigation, and enrollment.
- Coordinate plan events such as enrollment, fund changes, distribution communications, etc.
- Effectively communicate to relevant parties accounting principles, IRS tax regulations, payroll duties related to deferred compensation plans, and informal funding concepts.
- Educate external parties (client, advisor, legal, CPAs, payroll, etc.) regarding proper operations within the scope of governing rules for nonqualified deferred compensation plans and employer owned life insurance programs.
- Consult with clients and advisors regarding changes or enhancements to their plan, processes and procedures for events, accounting and tax implications, etc.
- Request, gather, and disseminate data necessary for plan reporting to internal teams (e.g., contributions, enrollment materials, events, participant information, and policy information).
- Understand and effectively communicate asset/liability relationship.
- Review and interpret legal plan documents.
- Maintain thorough understanding of Pangburn's current capabilities for each service offered.

### **Required Skills:**

- Working knowledge of and ability to apply and explain IRC Section 409A rules and regulations
- Understanding of informal funding concepts relative to nonqualified plans
- Maintains 100% confidentiality with regard to corporate, client, and vendor information
- Proficient in Excel, Word, and PowerPoint
- Prioritizes and performs multiple tasks simultaneously by establishing priorities, planning ahead, and anticipating potential issues in order to meet deadlines and client expectations
- Pays careful attention to detail and accuracy ensuring that all deliverables meet client expectations
- Self-motivated and takes initiative
- Models high ethical standards; establishes and maintains all business relationships on the basis of integrity & trust



*It is through engaged employees, valued client relationships, great benefits, and a dynamic culture balancing hard work and fun, that The Pangburn Group has 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.*

*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.*