



# Client Relations 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. The Pangburn Group has been named to the Baton Rouge Business Report's Best Places to Work for nine consecutive years. It is through engaged employees, interesting client relationships, great benefits, flexible work environment, and a dynamic culture balancing hard work and fun, 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
  - client and advisor follow up
  - password resets
  - 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
- Ensure all work completed includes timely and accurate notes in shared system
- Serve as liaison between Client Relations and Operations Units

## Required Skills:

- Maintains 100% confidentiality with regard to corporate, client, and vendor information
- Demonstrates excellent written and verbal communication skills.
- Proficient in Microsoft Excel and Word
- Maintain an organized approach to duties and responsibilities; detail-oriented
- Strong customer relation skills
- Self-motivated with the ability to work independently
- Prioritizes and performs multiple tasks simultaneously by establishing priorities, planning ahead, and anticipating potential issues in order to meet deadlines and expectations
- Works and participates effectively in a team environment
- Values punctuality, attendance, & the worth of company time
- Models high ethical standards; establishes and maintains all business relationships on the basis of integrity & trust

*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.*