



Account Manager

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, have an aptitude and willingness to learn, and possess a strong desire to succeed.



The Pangburn Group, located in New Roads, Louisiana, a short drive from Baton Rouge, was recently named #7 in Baton Rouge Business Report's 2018 Best Places to Work. It is through engaged employees, interesting client relationships, great benefits, 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's degree in Business, Accounting, Mathematics or related field or equivalent work experience.

Position Overview: Account Managers are responsible for analyzing and interpreting benefit plans to ensure they are setup properly in our proprietary database system and are operated in accordance with applicable regulations. Responsibilities include regular preparation of accurate and timely reports to clients; maintaining plan transactions; communicating internally and externally to maintain records; and assisting clients by educating them on the fundamentals and operations of their plan.

Duties:

- Audit and process transactional data (e.g., contributions, investment allocations, payments)
- Prepare periodic reports for clients, prospective clients, and financial representatives
- Maintain and monitor participant and plan sponsor access to online information
- Set up and monitor plan enrollment (online and/or hardcopy) 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, and scheduled payouts
- Interpret legal agreements to document and establish new plans in the database system
- Analyze plan operations with regard to US Internal Revenue Code Sections for compliance
- Interpret and explain accounting entries for benefit plans, accounting entries for related informal funding vehicles, and supporting information of calculations provided

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.

- Communicate with client, advisors, and internal team members efficiently and effectively to ensure that the plan operates properly
- Responsible for internal maintenance of clients files (e.g., invoicing, documentation)
- Participation and/or coordination of projects to improve systems and/or procedures

Required Skills:

- Ability to learn, understand, and communicate complex tax and regulatory issues pertaining to nonqualified benefit plans
- 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 attention to detail and accuracy of work and maintain an organized approach to duties and responsibilities
- Ability to work independently in a self-directed manner
- Strong customer relation skills with the ability to foster and maintain an effective team environment