



Client Relationship Manager

The Pangburn Group

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

Location: Headquartered in New Roads, Louisiana; Hybrid work is available after initial orientation period

Duties:

- Develop and maintain client and advisor relationships in line with Pangburn's servicing model
- Answer participant and plan sponsor questions (e.g., plan design, reporting, website, and enrollment)
- Coordinate plan events such as enrollment, distribution communications, fund changes (if applicable)
- Effectively communicate to relevant parties accounting principles, IRS tax regulations, payroll duties related to deferred compensation plans, and informal funding concepts
- Educate external parties (e.g., client, advisor, legal, CPAs, payroll) 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., plan contributions, plan assumptions, enrollment materials, event details, participant information, and policy information)
- Understand and effectively communicate the correlation of plan liabilities and informal funding based on plan design and strategy
- Review and interpret legal plan documents
- Maintain thorough understanding of Pangburn's current capabilities for each service offered

Required Skills:

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