THE PANGBURN GROUP

Account Manager

Nonqualified Benefit Plans, Daily Valuation

LOCATION	EDUCATION
New Roads, Louisiana Hybrid work available after initial orientation	Bachelor's degree in Business, Finance, Economics, Accounting, Mathematics, or related field

About the Opportunity

The Pangburn Group is a leading provider of recordkeeping and consulting services for nonqualified deferred compensation plans. For more than 30 years, we have built our business on technical expertise, exceptional service, and trusted client relationships.

We are proud to be recognized for 10 consecutive years as a **Baton Rouge Business Report Best Company to Work For**!

We are seeking an Account Manager for our Daily Valuation team who is analytical, detail-oriented, curious, and enjoys learning complex concepts and solving problems. **Prior experience with nonqualified plans is not required—we provide the training needed to develop specialized expertise.**

What You'll Do

- Analyze and enter data into Pangburn's proprietary database system to ensure daily online account balances are accurate and up to date
- Generate and post accurate, timely accounting reports, enrollment reports, FICA reports, and participant benefit statements to client websites
- Prepare and post adjusting entries, distribution statements, and ad hoc reports related to events such as terminations and participant deaths
- Maintain client records and participant accounts as system enhancements and updates are released
- Ensure client tasks, including reports and enrollments, are completed accurately and on time in accordance with established processes and procedures; coordinate with team members to ensure client needs are addressed
- Set up and test online enrollment and coordinate implementation timelines with Client Relationship Managers
- Process fund changes and maintain related account information
- Assist with ad hoc projects and perform other responsibilities as assigned by Management

What We're Looking For

- Bachelor's degree in Business, Finance, Economics, Accounting, Mathematics, or a related field
- 1–2 years of professional experience preferred; strong recent graduates will be considered
- Proficiency in Excel, Word, and PowerPoint

- Strong attention to detail and commitment to accuracy
- Ability to prioritize and manage multiple tasks, plan ahead, and anticipate potential issues to meet deadlines and client expectations
- Takes ownership and initiative to meet client expectations, including appropriate follow-through, follow-up, and knowing when to involve others
- Effectively communicates with individuals at all levels of the organization
- Works collaboratively and contributes effectively in a team environment
- Self-motivated, takes initiative, and takes ownership of responsibilities
- High level of integrity and commitment to confidentiality

What You'll Learn

- IRC Section 409A and nonqualified plan administration
- Daily valuation and recordkeeping of nonqualified retirement plans
- Pangburn's proprietary database and recordkeeping technology
- Account balance analysis and transaction processing
- Accounting, enrollment, FICA, and participant benefit reporting
- Online enrollment processes and fund changes

If you enjoy learning, solving complex problems, working with data, and taking ownership of accurate, timely work in a team environment, **Pangburn offers an opportunity to build expertise in a highly specialized area of financial services.**