



THE PANGBURN GROUP

Client Relationship Manager

Nonqualified Benefit Plans

LOCATION

New Roads, Louisiana
Hybrid work available after initial orientation

EDUCATION

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 a Client Relationship Manager 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

- Build and maintain strong client and advisor relationships.
- Serve as a resource to clients, advisors, and participants on plan recordkeeping, reporting, enrollment, distributions, and related matters.
- Coordinate plan events and gather and analyze information needed for plan recordkeeping and reporting.
- Consult with clients and advisors regarding plan changes, processes, procedures, and tax and accounting considerations.
- Review and interpret plan documents and ensure plans are administered in accordance with their terms.
- Explain complex concepts, including tax regulations, accounting principles, payroll considerations, and informal funding strategies.
- Work collaboratively with internal teams and external professionals, including attorneys, CPAs, financial advisors, and payroll providers.
- Develop a thorough understanding of Pangburn's services, systems, and processes.

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
- Strong analytical, problem-solving, and communication skills
- Excellent attention to detail and commitment to accuracy

- Ability to manage multiple priorities, meet deadlines, and anticipate potential issues
- Proficiency in Excel, Word, and PowerPoint
- Self-motivated, takes initiative, and takes ownership of responsibilities
- High level of integrity and commitment to confidentiality
- Ability to build professional relationships based on trust

What You'll Learn

- IRC Section 409A and nonqualified plan administration
- Plan design and operational requirements
- Accounting, tax, payroll, and FICA considerations
- Informal funding strategies
- Employer-owned life insurance programs
- Plan documents, reporting, and recordkeeping systems

If you enjoy learning, solving complex problems, working with data, and helping clients, **Pangburn offers an opportunity to build expertise in a highly specialized area of financial services.**