PLANNING SOLUTIONS GROUP
Exceeding Expectations in Wealth Management

Job Title:	**Director of Retirement Plan Services**
Status:	**Full-Time**
Relevant Work Experience:	**4-5 years**
Job Category:	**Financial Services**
Licenses:	**Series 7, 66**

Job Description

About us -

We are a fee-based financial planning practice located in Maple Lawn, MD. Our holistic planning process, *The Family Wealth ContinuumTM,* is one of the most robust planning processes in the industry and centered on true planning. As a firm we focus on wealth management, asset management, estate preservation planning, business planning, and retirement plan consulting. Our clients are among the area's most prestigious professionals and organizations. Our team is cohesive, fast-paced, and professional. Together, we provide our clients with an extraordinarily high level of service.

About the position –

The primary responsibility of the Director of Retirement Plan Services is to assume the management of the firm's corporate sponsored retirement plans department. We are looking for an individual that is motivated, organized, knowledgeable, proactive and has strong interpersonal skills. We are an open architecture firm focused on our client's needs by providing superior service and objectivity.

Job responsibilities -

- Evaluate investment platforms for use with each retirement plan client; compare fees, investment options, administration, and user friendliness for participants and plan sponsors in accordance with DOL guidelines.
- Actively prospect for new 401(k), 403(b), and Profit Sharing Plan business.
- Work with wholesalers to produce proposals for prospective clients and outlining options for the client using PSG's current planning processes.
- Develop relationships with our third-party administrators in determining plan design for prospects and any potential changes to existing plans.
- Create new processes and document templates that can be used for proposals and plan reviews.
- Coordinate enrollment meetings with plan sponsors and their participants.
- Engage plan participants to identify personal planning opportunities for other planners within the firm.
- Develop and implement a 401(k)-plan review and participant education schedule for existing and prospective clients.
- Manage incoming 401(k) participant requests and service needs.

We offer -

A robust benefits package, a supportive and professional environment, a salary commensurate with your experience, and a real opportunity for professional development.

- **Health, Dental & Vision**
- **401K**
- **LTD & STD, Life Insurance**
- **Paid time off (PTO)**

To apply- Email your resume, cover letter, and salary requirements to Bill Bruns at wbruns@psgplanning.com
EOE