

CLIENT RELATIONSHIP MANAGER

Responsible for the delivery of effective and efficient administration of non-qualified executive benefit plans. Serves as the primary liaison with carriers and clients to facilitate the administrative aspects of policies and plans.

Responsibilities

- Respond directly to existing plan participants and retirees on service-related inquiries in a timely fashion.
- Act as primary contact with clients and advisors on plan administration issues.
- Update client administrative database to reflect changes in plan participants' fund allocations, beneficiaries, contact information, etc.
- Process participant terminations, death claims, payroll deferrals, distributions, asset allocation changes, etc.
- Handle non-qualified executive benefit plan enrollments by organizing and coordinating the annual enrollment process for each corporate client including the process for enrolling people throughout the calendar year. This will include coordination and updating of the online enrollment process, processing of enrollment forms, preparation of enrollment and communication materials, as well as conducting onsite enrollment presentations and online webinars.
- Update system to track periodic and one-time service requests as well as plan participant inquiries.
- Generate reports of service events requiring attention during subsequent one month, quarterly, or annual intervals (e.g., participant statements, corporate accounting reports, etc.).
- Maintain a comprehensive understanding of all of the plan designs and plan provisions.
- Maintain contemporary knowledge of accounting and legal issues affecting non-qualified executive benefit plans.
- Participate as a team member in special projects.

Qualifications

Education and Experience

- Four-year college degree.
- Three years of experience in administration of non-qualified executive benefit plans (preferred).

Skills

- Excellent interpersonal skills.
- Strong verbal and written communication skills.
- Ability to work autonomously and perform well under pressure.
- Strong attention to details with ability to organize, prioritize, and manage multiple tasks within set deadlines.
- Strong negotiation and decision-making skills.

Mezrah Consulting Culture

- **Fun:** At the core of everything we do
- **Honesty:** Open and honest communication is paramount and valued
- **Integrity:** We stand behind our commitments to our employees and clients alike
- **Innovation:** We embrace change and are always thinking with a vision toward the future, creating new strategies and simplifying complex ideas
- **Focus:** Growing business by growing our people