



**Position Title:** Associate, Retirement Plan Advisory Services

**Department:** Retirement Plan Advisory Services

**Reports To:** SVP, Retirement Plan Advisory Services

**Location:** Manhattan, NY

**The Purpose of Your Role:**

Do you want to work for a fast paced, growing organization where people make the difference? We are seeking an outgoing, highly motivated individual to join our Retirement Plan Advisory Team in our NYC office. This important role will provide strong support to our Retirement Plan Advisory Team.

This role will also serve as the Office Manager for the NYC office. You'll be the go-to person for office needs, helping our Advisory Team service their clients smoothly and efficiently. As an Office Manager you will oversee every aspect of the office space and focus on enabling employee productivity and happiness.

The ideal candidate will be committed to providing superior customer service while being self-motivated to learn industry material to grow within Sentinel. Strong organizational skills, written and verbal communication skills, ability to anticipate needs, work independently and prioritize workload are required.

**The Expertise We're Looking For:**

- Prepare presentation materials for retirement plan reviews and employee education meetings (digital and hard copy)
- Assist with pre-meeting preparation and post-meeting follow-up
- Institutionalize appropriate information and history in CRM system
- Manage plan benchmarking process via Fiduciary Benchmarks, Inc.
- Manage access to Sentinel Vault for internal/external parties
- A sincere interest in working within/learning the financial services industry. (if you don't have financial services experience)

**The Behaviors That You Bring:**

- **Integrity** – Your customer-centric attitude and commitment to doing what is right for our clients
- **Expertise** – You are a team player and continuous learner. You share your knowledge with the team, embrace new learning opportunities, and search for ways to improve our operations
- **Empowerment** – You demonstrate organizational skills, the ability to manage priorities, deadlines, and troubleshoot issues independently
- **Excellence** – Your detail-oriented approach leads to quality processing results for our clients and your communication skills allow you to communicate effectively with clients and internal team members
- **Innovation** – You learn quickly, collaborate with others, and share your ideas for improving our service

**The Excellence You Deliver:**

- Develop knowledge of Investments, specifically mutual funds and collective investment trusts (CITs)
- Act as team resource for generating Morningstar fact sheets and gathering CIT data/fact sheets as necessary
- Develop knowledge of Sentinel's Total Choice recordkeeping/TPA platform and Alliance Partner platforms
- Support sales and marketing development initiatives
- Coordinate with/backup Wakefield office counterpart(s)
- Organize and track hardware for meetings to assure all items are properly accounted for and coordinated



- Participate in and contribute to special projects
- Serve as office liaison to Information Technology team
- Serve as Office Manager; responsibilities for NYC office to include:
  - Maintenance of equipment; service coordination (copy machine, printers, fax, internet, etc.)
  - Manage/order supplies as needed (coffee, paper, toner, etc.)
  - Purchasing fruit for the office
  - Care of incoming and outgoing mail
  - Other responsibilities, as necessary, to ensure office runs smoothly

#### **About You:**

We are looking for natural leaders, who are highly ambitious, hardworking, and determined to succeed. We are looking someone with an entrepreneurial spirit, customer focus, drive, and determination. Our industry is forever changing and we are looking for someone who is flexible and willing to embrace change.

#### **Education, Skills and Experience:**

- College degree or equivalent work experience
- Excellent organizational, communication, presentation, and follow up skills
- Proficient in Excel, Word, PowerPoint and overall ability to learn and use different software packages
- Detail orientated, systems orientated and tech savvy
- You take the initiative and make things happen
- Team player

#### **Our Company:**

Sentinel Benefits & Financial Group proudly serves more than 3,500 clients throughout the U.S., and for 30 years, we've remained devoted to making a difference in the lives of our people, our clients and our community. With nearly 200 professionals tied to our mission to deliver great service—and a 9-year average associate tenure—we have become the thought leader we are today.

From our conveniently located office in Manhattan NY, you will enjoy a collaborative work environment that encourages cross-departmental creativity and engagement. We're looking for dynamic individuals, self-starters and team players to join our team. Recognized as one of the largest employee benefits firms in Massachusetts (Boston Business Journal), a top 100 retirement plan adviser (PLANADVISER Magazine), and the 2016 recipient of the Best-in-Retirement Business IMPACT Award™ by Charles Schwab, our in-house experts—and their commitment to excellence—define who we are.

#### **Our Culture:**

Our people care about our organization. We are a company with a mission to be the best in our industry. Being part of this company means that you are part of something special. Sentinel Benefits & Financial Group offers paid vacation, 10 holidays and 1 floating holiday, company sponsored medical and dental insurance, life insurance, AD&D, short and long-term disability, 401(k) Plan and free parking. Sentinel Benefits & Financial Group is an Equal Opportunity Employer.

Interested candidates should email a resume to: [hr@sentinelgroup.com](mailto:hr@sentinelgroup.com), **SUBJECT LINE: Associate, Retirement Plan Advisory Services**. For further information, please check us out at [www.sentinelgroup.com](http://www.sentinelgroup.com)