

DIRECTOR OF CLIENT RELATIONS

Manage the team responsible for the delivery of effective and efficient administration of non-qualified executive benefit plans. Responsible for the development of the department. Serves as the primary liaison with carriers and enterprise level clients to facilitate the administrative aspects of policies and plans. This position reports to the Vice President of Client Success

Responsibilities

- Coach, develop, mentor, and manage the Client Relationship Team from both a team and individual perspective
- Perform Quarterly Performance Reviews for direct reports
- Perform bi-weekly pull-ups with direct reports to go over their Results Progress and Issues
- Listen to recorded calls and review electronic communication to provide feedback to the Client Relationship Team members
- Revise existing and implement new policies and procedures to ensure the Client Relationship Team is providing superior customer service in a professional, timely, and accurate manner
- Ensure policies and procedures are being followed through training and review of everyone's work product
- Develop relationships with assigned clients and act as primary contact with clients and advisors on plan administration issues
- Schedule and lead meetings with clients to provide updates on the administration of their plan
- Ensure plan participants are responded to on service-related inquiries in a timely fashion
- Ensure mapbenefits (administration database) is updated timely to reflect changes in plan participants' fund allocations, beneficiaries, contact information, etc.
- Ensure all participant terminations, death claims, payroll deferrals, distributions, asset allocation changes, etc. are processed timely
- 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.
- Ensure mapbenefits is updated 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, with the ability to interpret legal non-qualified plan documents
- Maintain contemporary knowledge of accounting and legal issues affecting non-qualified executive benefit plans
- Make enhancement recommendations for existing plan documents and confirm documents are compliant with relevant tax laws
- Implement new plans (e.g., designing new plans and working with counsel to create the plan document, setting up the client and/or plan in our administrative platform, creating enrollment materials, developing communication pieces, etc.)

- Transition existing plans to our administrative platform
- Asset / Liability management for non-qualified deferred compensation plans
- Participate in the hiring process as needed
- Participate as a team member in special projects

Qualifications

Education and Experience

- Four-year college degree.
- Five years of experience in administration of non-qualified executive benefit plans preferred
- Three years of management or supervisory experience

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.
- Ability to influence and lead a team of customer service focused individuals
- Strong organizational 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