ESOP Retirement Plan Services Supervisor
Alerus

Oversees and manages assigned team of Retirement Account Administrators, primarily serving Employee Stock Ownership Plans (ESOP). Helps foster a cohesive service team by directing workflow, supporting strong communication and displaying good judgment and leadership to ensure the proper administration of all plans. May be responsible for client service, compliance and Form 5500 reporting of an assigned group of retirement plans, typically 10-25 plans. Establishes and maintains relationships with assigned retirement plan clients in order to achieve or exceed client service and retention standards.

Job Function Number 1: *Management and Leadership - 45%*

- Participate in recruitment, development and retention of qualified retirement account administrators.
- Coach, mentor and motivate staff to evaluate and take actions that follow established practice standards leading to a consistent service model.
- Assure progress is made toward achieving all major goals and objectives within timelines established by working with staff in executing the plans.
- Enthusiastically embrace and model change amongst peers as a proven leader.
- Offer suggestions and ideas to management and actively engage in or manage their development as assigned by management.
- Maintain active reporting process to all interested parties on all projects where assigned a leadership role.
- Be an experienced and knowledgeable source of information and guidance.

Job Function Number 2: *Teamwork and Communication - 35%*

- Actively engage in the success of ARB and Alerus, promoting and supporting new and ongoing initiatives with positive active team involvement resulting in a successful outcome.
- Actively lead and/or participate in projects to improve the products and services offered by ARB, including project groups tasked with developing enhanced procedures or policies.
- Maintain positive relationships with internal and external customers while providing quality service.
- Take responsibility for service team communication and workflow; maintain excellent and timely communication among all involved parties.
- Help to resolve workflow issues on service team and address issues that cross department lines, using judgment with respect to management involvement and consideration of high level business impact and application.
- Support and promote communication within the service team through direct communication, Client Gateway and other available tools as needed in order to build strong internal relationships.
- Actively supports the use of Client Gateway by documenting pertinent conversations and emails with clients and others as applicable.
- Begin to provide solutions to plan needs by working with management, the service team and compliance on outstanding issues and/or new features available due to recent legislation or product enhancements.

Job Function Number 3: *Compliance and Form 5500 Reporting - 20%*

- Monitor receipt of client's census information to prioritize completion of compliance tests and/or Form 5500 reporting for an assigned set of plans.
- Understand and interpret plan document and contract provisions and apply experience and judgment to situational problem resolution. Work with management and/or RRM if needed.
- Possess the necessary skills to administer a percentage of more complex defined contribution plans.
- Ensure that appropriate compliance tests are accurate and completed within standards.
- Identify changes/amendments needed to documents due to client requests.
- Proactively employ/share technical knowledge of and experience with ERISA and retirement plan administration with clients, direct reports and other colleagues.
- Instruct and provide guidance to retirement account administrators on a variety of compliance issues and situations.

Qualifications:

- 4+ years of related experience in retirement plan recordkeeping/administration with knowledge of ESOP, IRS and Department of Labor regulations.
- Bachelor degree in finance, economics, accounting, business administration or related field or equivalent combination of education and experience.
- Possess or working towards attaining ASPPA's QKA certification or equivalent.
- High level written and verbal communication and presentation skills.
- Broad experience with client services, plan administration, trust services and participant record keeping, including experience interfacing with trustees, clients, and plan participants.
- Proficient in Microsoft Word and Excel.

Personal Characteristics:

- Developing relational skills such as diplomacy, judgment, decision making, and discretion.
- Ability to multi-task, prioritize workflow of self and others and coordinate activity as an effective team member to meet deadlines and make effective decisions under pressure.
- Established communication, presentation and organizational skills.
- Demonstrating professional business skills and demeanor.
- Demonstrating the ability to identify and problem solve complex situations and apply judgment with respect to high level business impact and risk.
- Proven ability to work with detailed technical knowledge of all types of retirement plans.

Physical Demands: (must be met with or without a reasonable accommodation)

- Requires ability to use sit for long periods of time using a key board, mouse and to view multiple screens.
- Requires ability to use telephone for client contact and conference calls.

Alerus Financial is an Equal Opportunity Employer of women, minorities, protected veterans and individuals with disabilities.

How to apply: Visit our website at www.alerus.com/careers and select the Retirement Plan Services Supervisor or apply directly at https://recruiting2.ultipro.com/ALE1000ALFN/JobBoard/8c322eba-32b7-

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