PENSION LAW SPECIALIST RESUME

Summary:

A highly dedicated individual who manages the administration, communication, and compliance of the Bank's retirement and related benefit plans and programs in direct support of employees in multiple states and subsidiary companies; ensures compliance and proper documentation in regard to all applicable laws and regulations.

Professional Experience:

Pension law Specialist February 2006-Present
JP Morgan Chase, Chicago, IL

Responsibilities:

Updated pension scheme member records.
Transferred benefits into or out of the scheme, based on member's request, which is substantiated and affirmed by the member's signature.
Provided statement of accounts to keep the pension member updated of his/her records and benefits.
Calculated benefits and pension releases.
Processed retirement documentations and arranged payments of lump sums or pensions.
Provided high level support and customer service.

Pension Account Manager June 2004-February 2006
Lincoln Financial Group, Arlington Heights, IL

Responsibilities:

Demonstrated ultimate accountability for client relationship and provided strategic direction for clients to ensure unmatchable excellence and compliance with ERISA in accordance with the client's plan document and Lincoln Retirement's policies and procedures.
Responded to our key & elite (> mil in assets) strategic partners' (field partner, TPA & plan sponsor) calls, requests and inquiries regarding multiple market concepts, products, pricing, services and plan design issues.
Reviewed & evaluated processes between Lincoln and the TPA and recommended, initiated and managed resolutions and improvements to ensure strategic partners' expectations are met.
Facilitated discussion regarding contract pricing and changes to that pricing with our field partners.
Analyzed customer feedback to better meet emerging customer expectations.

Benefit Administrator (Retirement) May 2002-May 2004
Valley National Bancorp, Wayne IL

Responsibilities:

Updated pension scheme member records.
Transferred benefits into or out of the scheme, based on member's request, which is substantiated and affirmed by the member's signature.
Provided statement of accounts to keep the pension member updated of his/her records and benefits.
Calculated benefits and pension releases.
Processed retirement documentations and arranged payments of lump sums or pensions.
Provided high level support and customer service.

Pension Account Manager June 2004-February 2006
Lincoln Financial Group, Arlington Heights, IL

Education:

Bachelor of Business Accountancy, Banking and Finance
Stanford University, CA, 2002

Skills:

- Ability to Synthesize
- Accounting Technical Skills
- Analytical Skills
- Computer Competency

- General Business Skills
- Team Orientation

Affiliations:

Member, California Society of Certified Public Accountants
Member, American Institute of Certified Public Accountants
Member, National Society of Tax Professionals
Member, Professional Fiduciary Association of California
Associate Member, Trusts & Estates Section of the State Bar of California