
Retirement Specialist Resume

Job Objective

Experienced Retirement Specialist of many years seeking employment with the company to help advance in the industry.

Highlights of Qualifications:

- Profound knowledge of statutes and policies related to the retirement system
 - Vast experience with HRIS/ data collection and LAWSON ERP
 - In-depth knowledge of basic and general accounting and auditing procedures
 - Proficient with MS Office tools, including Word, Excel, and PowerPoint
 - Extensive knowledge of benefit contract language
 - Excellent communication and analytical skills
 - Ability to understand, evaluate and make judgment on the proposals (RFP's)
 - Familiarity with rules, regulations and tax implications
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Professional Experience:

Retirement Specialist

Nationwide Insurance, Brooklyn, NY

May 2006 – Present

- Daily Reconciliation of wires for Retirement Plans Department.
- Conducted State income tax withholding and 1099R/5498 tax reporting corrections.
- Recognized and satisfied client's stated and unstated needs.
- Monitored client's investment experience and knowledge, preferences and action orientation, and retirement goals.
- Analyzed various retirement and investment plans and potential impact.

Retirement Specialist

American International Group, Brooklyn, NY

March 2003 – April 2006

- Managed assigned nonqualified retirement plans, pension plans and 401(k) plans.
 - Provided resolution on daily administration issues.
 - Presented the guidance and advice on investments and services.
 - Liaised between the plan administrator and outside counsels in DRO proceedings.
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Education:

Bachelor's Degree in Commerce

Triton College, River Grove, IL

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