STILES FINANCIAL SERVICES
INCORPORATED

July 30, 2019

<u>Retirement Plan Analyst – Full-time Salaried Position</u>
Send Resume with cover letter to susan@stilesfinancial.com

Who We Are

We are a service-oriented, fee based, independent and successful financial services and consulting firm based in Edina, MN. We provide an array of services ranging from investments, planning, insurance and retirement plan fiduciary based consulting. Our office is located in Edina and provides a comfortable high energy, fast paced and collaborative professional work environment. Our office culture is friendly and congenial, client centered and growth oriented. Emphasis is placed on very high quality output and deliverables that generate positive results. We value independence and maintain the highest professional standards in excellence and integrity.

Retirement Plan Analyst

Primary responsibilities include the production and oversight of the quarterly client investment and plan reviews and relationship management support. You will work closely with SFSI retirement team members on client deliverables. You will have the opportunity to learn and take on additional responsibilities.

Quarterly Client Investment Review Process:

- Obtain current quarter's plan information from multiple systems including updated fund performance, current fact sheets, investment scorecard data, etc.
- Obtain, review and audit current administrative and trust reports from client's vendor(s)
- Develop plan materials to be utilized at committee meetings including agenda, economic/market update, plan statistics, investment analysis, and recommendations
- Work with Relationship Manager to:
    - Audit plan fees and revenue sharing
    - Benchmark plan investment expenses and vendor charges
    - Create customized reports based on above data
- Work with Portfolio Manager to:
    - Analyze fund performance and make recommendations regarding funds to hold, put or remain on watch list, and screen replacements
    - Develop, back-test and benchmark custom asset allocation and target based portfolio strategies
- Interact with client's vendor(s) to oversee issue resolution and implement fund changes, as necessary
- Interact with DCIO representatives to obtain desired data
- Propose new tools, new reports, etc., as necessary
- Master the programs utilized to create the reports

Retirement Team Support

- Assist in vendor searches, as necessary, including proposal requests, review of submitted proposals, analysis of proposed investments and fees
- Attend some quarterly investment committee meetings and other meetings, as scheduled
- Interact with key contacts at client organization
- Interact with key contacts at client service providers including attorneys, CPAs, administrators

Additional Responsibilities:

- Stay current on economic and investment trends
- Stay current on retirement plan regulatory environment and trends
- Stay current on vendors and marketplace changes
- Attend conferences and seminars
- Keep licenses and credentials current, if any

Qualifications/Skills:

- College degree in business, finance or accounting
- 1-2 years of financial services experience
- Strong computer and organizational skills
- Detailed oriented and focused on accuracy
- Strong verbal and written communication skills

Traits

- Professional and proactive
- Ability to multi-task
- Ability to work well in a small office team environment

Helpful but not required:

- Retirement plan experience
- Knowledge of RPAG (Retirement Plan Advisory Group), Fi360, Morningstar
- FINRA licensing
- CEBS, CPC, AIF, CFA or CIMA designations, or willingness to obtain

Compensation and benefits commensurate with experience
SFSI is an EEOC Employer
Contact Susan Stiles at 952-988-0452 or susan@stilesfinancial.com