

Senior Consultant - ESOP

Findley Davies | BPS&M is an independent consulting firm specializing in employee benefits and human resources strategy. We help clients make critical decisions about employee pay, benefits, and change management to align their human resources strategy with their organizational objectives.

For more than 45 years, Findley Davies | BPS&M has provided strategic counsel to help organizations navigate the changing benefits landscape and successfully manage workforce issues.

Together, we serve more than 1,800 clients nationwide through our eight offices located in Illinois, Kentucky, Mississippi, North Carolina, Ohio, and Tennessee.

www.bpsm.com



The Senior Consultant - ESOP manages ESOP recordkeeping and consulting relationships and represents our consulting services to the market. This is a role for an experienced ESOP professional.

Job Responsibilities

- Develop relationships with clients, prospects, and referral sources within the ESOP market to grow revenue from this channel
- Build trust and serve as an escalation point with clients to ensure client satisfaction and delivery of services according to agreements
- Manage firm and client projects
- May manage activities and/or employees for a service line or team
- Provide guidance, technical expertise, training and direction to team members within the DC practice area and ESOP market specialization
- Communicate effectively with clients and partners to build interest and credibility
- Participate with firm leadership to formulate and administer policies and develop long range goals and objectives for the ESOP practice
- Attain individual and/or team billing and realization rate goals, which directly affect the profitability of the firm

Typical Tasks

- Sales and business development activities, including creating marketing presentations, preparing proposals, presenting at industry seminars, etc.
- Reviewing client work (such as allocations, nondiscrimination testing, and reports) and providing feedback to team members
- Consulting on complex ESOP operational and design issues
- Assisting other consultants to prepare for client meetings or sales activities

Core Competencies

- Expert in the design, operation, and regulations governing defined contribution plans, including 401(k), ESOP, 403(b), and 457, with a strong emphasis on ESOPs
- Strong analytical and problem solving skills
- Intermediate Microsoft Office skills, particularly in Excel and/or Access
- Ability to research complex employee benefit plan issues and provide solutions
- Excellent verbal, written, and interpersonal skills
- Ability to review the work of others to ensure quality and accuracy of work products

Education and Experience

- Bachelor's degree, preferably in Business, Mathematics, Finance, or related;
- 10+ years of employee benefits or defined contribution experience;
- 6+ years ESOP design and operations experience; and
- QPA, CEBS, MBA, CPA or comparable designation preferred.

To Apply

Submit your resume online at resumes@bpsm.com