

### ESOP Consultant

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](http://www.bpsm.com)



The ESOP Consultant will manage ESOP recordkeeping and consulting relationships. This role is for an experienced professional.

#### Job Responsibilities

- Develop and maintain client relationships, ensuring client satisfaction and delivery of services according to agreements
- Manage defined contribution plan projects
- Keep current on defined contribution regulations and trends, in particular ESOPs, and translate that information to clients
- Identify and develop opportunities for new client engagements from existing clients, and may have a specific goal for earning new business
- Identify and resolve complex issues for clients
- Communicate effectively with clients and partners to build interest and credibility
- Design and implement effective processes in order to improve business results
- Research and present information to help clients understand their ESOP and other benefits plans
- Provide oversight and work direction to less experienced staff for client projects
- Attain individual billing and realization rate goals, which directly affect the profitability of the firm

#### Typical Tasks

Perform and/or oversee all aspects of defined contribution plan administration for complex plans, including:

- Data collection, validation, and analysis
- Calculations and analysis
- Government filings such as Forms 5330, 5500, and 8955-SSA
- Nondiscrimination testing
- Reconciliation of all work products
- Customized reporting

#### Core Competencies

- Expert in the design, operation, and regulations governing defined contribution plans, including 401(k), ESOP, 403(b), and 457
- Strong analytical and problem solving skills
- Intermediate Microsoft Office skills, particularly in Excel and/or Access
- Ability to meet deadlines with the highest degree of accuracy
- Excellent verbal, written, and interpersonal skills
- Strong organizational and problem solving skills with the ability to track multiple tasks and issues, set goals, and prioritize tasks in a fast-paced environment

#### Education and Experience

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

#### To Apply

Submit your resume online at [resumes@bpsm.com](mailto:resumes@bpsm.com)