



HYAS GROUP

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RETIREMENT PLAN ADVISORY CONSULTANT

Date: October 1, 2019
Title: Senior Consultant

POSITION SUMMARY

Senior consultants are responsible for developing new institutional clients, as well as maintaining existing relationships. The role requires the consultant to have an active role in the retirement plan services industry and to stay abreast of the various challenges in a dynamic investment environment.

ESSENTIAL DUTIES & RESPONSIBILITIES

The essential functions include, but are not limited to the following:

- > Conduct and lead client meetings at specific locations. Travel is a requirement of the job.
- > Present plan review/investment review reports to clients as frequently as quarterly
- > Handle day-to-day client inquiries timely and effectively
- > Develop long-term, mutually beneficial relationships with clients and decision makers
- > Develop strong vendor relationships
- > Generate solutions that address client needs and challenges
- > Participate in retirement plan strategy discussions with client team & colleagues
- > Serve as project lead for client related projects
- > Participate in sales and marketing process to prospective clients
- > Demonstrate strategic plan design knowledge of retirement plans
- > Stay current with industry regulations
- > Network within the business community and industry by participating in industry events and seminars

MINIMUM QUALIFICATIONS (KNOWLEDGE, SKILLS, AND ABILITIES)

- > BA/BS Degree with CFA, CFP or JD designations. FINRA Series 65 is required unless exempted through other credentials.
- > Minimum 5 years' experience working with qualified retirement plans including Defined Contribution (ERISA 401k and 403b) and public sector 457 and 401 DC plans, OPEBs and VEBAs. Experience with Defined Benefit plans is a plus. Relevant experience may include recordkeeping, investment and consulting.
- > Strong knowledge of investments, funding vehicle types and Third-Party Administrator / recordkeeping service providers.
- > Experience in driving fiduciary governance process for clients and assisting with all aspects of retirement plan administration.
- > Robust analytical capabilities, strong verbal communication skills and demonstrated success in committee steering/oversight.

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- > Demonstrated strength in building relationships and communicating effectively throughout the prospect sales process
 - > Must pass post-employment criminal background investigation, and reference inquires.
 - > Must have the ability to manage multiple tasks and meet deadlines.

COMPENSATION & BENEFITS

Compensation includes a base salary and bonus. The Firm offers a competitive benefit structure including healthcare, disability, life, 401(k) plan with employer contribution and discretionary profit-share and annual paid time off.

ABOUT HYAS GROUP

The Hyas Group is an institutional investment consulting firm serving the needs of retirement plan clients. As industry thought leaders, we hire innovative people that can thrive in an environment where value-add, conflict free advice is provided to all clients. Today, we serve over 140 retirement plan clients, representing \$32 billion in total assets.

CONTACT INFORMATION

Send a cover note and resume to careers@hyasgroup.com.