

## Senior Retirement Plan Consulting Position

**Description:** The Hvas 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 130 retirement plan clients, representing \$30 billion in total assets.

**Job Duties:** Senior consultants are responsible for developing new institutional client relationships and 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.

To fulfill this role, the Consultant will:

- Conduct and lead client meetings at specific locations (mainly west coast)
- Present plan review/investment review reports to client 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 to benefit clients
- Generate solutions that address client needs and challenges
- Participate in defined contribution strategy discussions with client team & colleagues
- Serve as project lead for recordkeeping RFPs
- Participate in marketing process to prospective clients
- Demonstrate strategic plan design knowledge of DC retirement plans
- Stay current with industry trends and regulations
- Network within the business community and industry by participating in industry events and seminars

### Qualifications:

- BA/BS degree with preference given to MBA, CFA, JD, CFP designations
- Minimum 5 years' experience working with qualified retirement plans including Defined Contribution (ERISA 401k and 403b) and public sector 457/401 DC plans. Background with Defined Benefit plans is a plus. Experience can include recordkeeping, investment and consulting and/or legal/regulatory.
- Strong knowledge of group variable annuity retirement plan products, mutual funds and investment firm retirement plan products, and Third-Party Administrator / recordkeeping service providers.
- Experience in driving fiduciary governance process with clients and assisting with all aspects of defined contribution plan administration.
- Robust investment analytical capabilities, strong verbal communication skills and demonstrated success in committee steering/oversight.
- Demonstrated strength in building relationships and communicating effectively throughout the prospect sales process.

**Compensation and Benefits:** We offer competitive compensation and benefit programs. Compensation for Senior Consultants includes a base salary and quarterly bonus.

If interested, please send a cover letter and resume to [careers@hyasgroup.com](mailto:careers@hyasgroup.com).