

Defined Contribution Specialist

2020

Client Leadership - Our Vision

An independent investment consulting firm, Marquette Associates guides institutional investment programs with a focused client service approach and careful research grounded in real-world experience. We've served clients with a single mission for over 30 years – enable institutions to become more effective investment stewards. We are recruiting for a DC Specialist to develop an expert knowledge of defined contribution plans and provide expertise on plan design to internal and external constituents.

Job responsibilities will include, but are not limited to:

- Develop and communicate Marquette's views on defined contribution benefits to current and prospective clients
- Research and monitor defined contribution plan industry trends including investment, regulatory, and fiduciary trends
- Serve as a key member of the firm's Defined Contribution Services Committee
- Meet with DC experts such as recordkeepers, investment managers, plan sponsors, and ERISA experts
- Represent Marquette at investment and defined contribution plan-related conferences
- Collaborate with consultants to perform projects for and present advice and education to plan sponsors
- Guide internal constituents with participant education best practices and prepare participant education materials
- Write papers on topical and academic research topics related to defined contribution plans such as plan governance and fiduciary best practices, plan design features, investment menu, behavioral finance, financial wellness, retirement planning, etc.

Qualifications:

- Bachelor's degree with more than four years of defined contribution retirement plan experience
- Strong client service experience and ability to present information to clients effectively and professionally
- Knowledge of behavioral finance, retirement saving, 401(K) plan designs, and investing concepts
- Progress towards or completion of one or more of the following designations: AIF, C(k)P, CRC, CRSP, CRPS, PPC (or similar)
- Strong writing skills; demonstrated ability to write summaries, white papers, and other internal and external communications
- Strong attention to detail and highly organized with ability to work independently to meet deadlines
- Ability to multitask in a fast-paced environment and react to change positively
- Solid knowledge of Microsoft Office; ability to quickly learn new software applications
- Critical thinking skills, a self-starter with excellent follow-up abilities
- Professional communication and interpersonal skills

Marquette Associates offers competitive benefits, including medical, dental and vision coverage; flexible spending plans for health care and dependent care; generous time off benefits; 401(k) plan with company match and more.

To apply, please forward your resume to hr@marquetteassociates.com with the subject line "DC Specialist – Your Name".

We are an Equal Opportunity Employer.