



Title: Plan Service Coordinator

Company: The Pangburn Group

Location: New Roads, Louisiana

Position: Full-time

Education Requirements: Associates Degree preferred

Experience Requirements: At least two years of work experience in an office environment.

Overview of the Position: To manage invoicing for the company and to gather, process, and input data in order to ensure that regularly scheduled/ad hoc reports are prepared in a timely manner for Account Managers.

Duties:

Invoicing:

- Schedule, generate & mail all client invoices using proprietary software system.
- Post and reconcile Accounts Receivable payments.
- Track overdue items in Accounts Receivable and generate & mail overdue notices.
- Prepare spreadsheets & reports of client fees according to various criteria.

Coordinating Data and Plan Maintenance:

- Maintain a close working relationship with carrier's policy services department in order to request policy information and keep abreast of any policy changes.
- Request, review and input policy values and run relevant client reports for Account Managers review. Prepare Quality Control worksheets associated with client reports.
- Monitor and update information contained in client records and spreadsheets to ensure all scheduled reports are completed on time.
- Complete data entry of information into proprietary plan administration software (e.g., census data and policy values)
- Ensure the accuracy of client files/binders including executed documents, etc.
- Create internal and external binders.
- Coordinate and mail all benefit correspondence such as enrollments, benefit statements and daily correspondence.

Miscellaneous:

- Assisting all areas of the company on an as-needed basis with regards to filing, scanning, faxing, mailing information to clients and plan participants
- Other duties as assigned by the Office Manager and/or Senior Management

Desired Skills:

- Proficiency in Excel, Word, and PowerPoint
- Ability to prioritize and perform multiple tasks simultaneously by establishing priorities, planning ahead, and anticipating issues in order to meet deadlines and client expectations.
- Ability to pay careful attention to detail and to accuracy of work, and stay organized
- Strong customer relation skills with the ability to foster and maintain client/broker relationships

About the Company: The Pangburn Group is a privately-owned, fee-for-service, nonqualified executive benefit plan third party administrator operating on a national basis. The Pangburn Group combines experience with technology to bring state-of-the-art plan administration to its clients.

Contact Info: Email your resume to jobs@pangburngroup.com

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