



JOB DESCRIPTION

Title: Employee Benefits Assistant

Reports to: Senior Employee Benefits Consultant

FBG Mission:

To optimize the health and well-being of those we serve.

FBG Values:

- High Energy: We demonstrate vitality and enthusiasm.
- Compassionate: We treat others with kindness and a helpful spirit.
- Internally Driven: We make it happen.
- Can Do: We greet opportunities and challenges with positivity and resilience.

Job Overview:

Provide administrative support to the Employee Benefits Consulting team in a variety of ways.

Essential Responsibilities:

1. Maintain the employee benefits department client database, including updating all content to ensure it is current at all times.
2. Format various employee benefits documents in Microsoft Office to ensure FBG standards are met consistently.
3. Assist with contract reviews, benefit administration testing, federal notices and 5500 preparation.
4. Proof and provide editing suggestions for a variety of employee benefits communication materials.
5. Assist with preparation of stewardship and financial reports for clients on an annual basis or as needed.
6. Assist with preparation of benchmark reports, open enrollment presentations, Brainshark presentations and other technology presentation or communication material used for clients.
7. Bind, collate and produce client materials using office equipment.
8. Reconcile carrier invoices on an as needed basis.
9. Prepare Wrap 360 documents.
10. Work with census data and put it in carrier-specific formats.
11. Handle various administrative tasks associated with client service.

Physical Demands and Working Conditions:

- Sedentary work that primarily involves sitting and standing.

- Occasional lifting and moving of objects of up to 20 pounds.
- May occasionally need to use stairs.
- Moving about to accomplish tasks or moving to various worksites, and on rare occasions, to client offices.
- Communicating with others, in verbal and written format, to exchange information.
- Repeating motions that include hands, fingers and wrists.
- Position may require local travel, less than 10% of the time.
- Position requires regular and reliable attendance.
- Position requires regular work on a computer, at least 80% of the time.
- Position requires proficiency in the English language and grammar, verbally and written.
- No adverse environmental conditions expected.

Knowledge, Skills and Abilities to Perform Satisfactorily in This Role:

- Support the FBG mission, values and cultural manifesto.
- Use necessary technology platforms including Zoom, GoToMeeting, Slack, etc.
- Expert level knowledge of the Microsoft Office suite.
- Represent FBG well, in person and via social media.
- High school diploma required. Bachelor's degree a plus.
- A passion for supporting a team of individuals in an administrative capacity.
- At least two years of administrative, support, or customer service experience.
- Prefer candidates who have provided support or service to a team.
- Ability to see projects through to completion.
- Proven aptitude for quick and creative thinking within demanding deadlines.
- Ability to be proactive and provide project status updates.
- Excellent verbal and written communication skills.
- Strong organizational skills.
- Ability to prioritize when multiple tasks are assigned.
- Resourcefulness; ability to think ahead.
- High sense of urgency and responsiveness.
- Willingness to do whatever it takes to get the job done.
- Ability to speak and write more than one language a plus.

By my signature below, I acknowledge that I understand the accountabilities of the role and that my performance will be evaluated based on my success in achieving the goals set out in the position. I also acknowledge that my job description may change due to changing company needs or environment and that my accountabilities may be changed or added to during the course of my employment. This document is not meant to be all-inclusive.

Employee Name

Date