

# Colleen B.

## Untapped Potential Candidate

Marketing / Project Management

860-977-9408 / fellowship@upotential.org



### PROFILE

Retirement Plan Services Professional with experience in Plan Conversions, Sales and Plan Administration.

### KEY COMPETENCIES

- Client service mindset
- Team player
- Ability to multi-task complex projects
- Proficient with MS Word, Excel, PowerPoint and proprietary software
- Highly analytical problem solver
- Detailed and organized
- Strong project management track record
- Ability to meet established deadlines
- Solutions oriented
- Adaptive to fluid responsibilities

### PROFESSIONAL EXPERIENCE

#### **New York Life Retirement Plan Services, Norwood, MA *Senior Conversion Specialist* (6 years)**

- Converted new clients from previous provider to NYL Retirement Plan Services
- Mid- to large-sized clients, typically 300-1,800 participants
- Worked with ERISA Consultant to review plan legal documents and recommend plan design enhancements
- Established and adhered to project timeline
- Tested processes and reviewed with client prior to 'live' date
- Established quality assurance protocols
- Coordinated the mapping of investments and data with client, previous provider and sales representative
- Created & delivered employee communications
- Provided training of Customer Service Representatives, Plan Administrator & Client Service Manager

#### **The Pension Service, Inc., North Haven, CT *Sales Consultant* (2 years)**

- Sales and marketing, account development, small- to mid-sized companies in New England,
- Lead development, formal pitch and development of fee proposal
- Team leader, Employee Education & Enrollment Meetings for new and existing clients

#### **The Pension Service, Inc., North Haven, CT *Plan Specialist* (3 years)**

- Acted as primary client contact
- Reconciled assets (\$100,000 – 10,000,000) of balance forward & daily valued plans

- Loan amortization and documentation
- Calculated company contributions
- Performed annual testing, including Coverage, Top Heavy and Discrimination Testing
- Prepared and filing of IRS Form 5500 & related schedules
- Calculated Required Minimum Distribution for eligible participants
- Provided quarterly/semi-annual/annual employer reports and employee benefit statements
- Ensured that plans were administered in accordance with the plan documents and ERISA compliance
- Calculated participant vesting and distributions

## **LEADERSHIP & COMMUNITY EXPERIENCE**

**Irish Cultural Benefit Society, Wethersfield, CT *Fundraiser Organizer*** (2010-2015)

- Raised approximately \$20,000 annually for the Irish Cultural Benefit Society. Responsible for acquiring donations from local businesses and benefactors and helped manage event budget, recruited, organized and trained approximately 30 volunteers.

**Substance Free Graduation Party, Canton, CT *Hospitality Chairperson*** (2015, 2016)

- Acquired and coordinated donations from local businesses, organized volunteers

**Other:** Organized CABC Concessions 2016,2017; GS Troop Leader 2004-2011; Winter Auction Fundraiser; Neighbors Helping Neighbors

## **EDUCATION AND CERTIFICATION**

- ***Marketing*** – University of Connecticut