



Retirement Plan Services Senior Compliance Associate – located in Houston, Texas

BOK Financial (BOKF), Headquartered in Tulsa, Oklahoma, BOK Financial Corporation (NASDAQ: BOKF) is a top 25 U.S.-based financial services holding company with operations in ten states – Oklahoma, Texas, Arkansas, Arizona, Colorado, Kansas/Missouri, New Mexico, Nebraska and Wisconsin. The company began more than 100 years ago in Tulsa and has successfully diversified into a variety of industries, businesses and geographies.

Summary

You place great value on building meaningful relationships, and you do so by leveraging your excellent interpersonal skills. You find satisfaction in helping others by offering sound advice. You make the most out of every opportunity. Bring your knowledge, skills, and abilities to us in Institutional Wealth as a Senior Plan Compliance Associate.

About the Role

Your main focus is to ensure retirement plans maintain IRS regulations. Clients vary in complexity and technical difficulty, thus the guidelines they adhere to vary, as well. You will provide expert consultation on plan regulations, mitigate risk and work with business partners to make sure everyone is aligned regarding each plan. You will assist with training team members, as well as with reviewing their performance. Developing working relationships with client personnel will position you to become the primary contact for routine issues.

What You Can Expect

You will draft, interpret, and amend documents; file the annual report with the IRS; review, approve, and process domestic relations orders. You will provide the required notices to participants around plan features. You will stay current on regulations and educate the team and clients on the latest information.

Completing tasks accurately and adhering to guidelines results in a job well done. You will become an expert on plan compliance while learning to research, investigate and review plans of various sizes. You will work with clients directly and be resourceful in finding solutions and solving problems.

Patience is a key to success in this role due to a long learning curve. There is a built in career path; all you need is a willingness to learn.

Team Culture

We are a collaborative, conscientious, and goal-oriented team. We value initiative, and we care about the quality of our work. Managers across the line of business are readily available and accessible for any needs you may have. You are responsible for driving the process, and our leaders are there to support you. Mentorship within the team is a common practice that will provide opportunities for growth.

We've created a safe space for you to brainstorm, ask questions, and find solutions together as a team. Everyone pulls together, no matter what role or level. There is genuine care and concern for a job well done. We lift up one another to become better.

How You'll Spend Your Time

- You will identify alternative solutions to all testing and compliance issues.
- You will manage and supervise the ADP (Actual Deferral Percentage) /ACP (Actual Contribution Percentage) testing for all plan compliance clients, review and perform ADP/ACP tests, and set up spreadsheets to do calculations for tests.
- You will manage and supervise the 5500 filings for client plans to ensure compliance and minimize risk to the bank.

- You will determine participant eligibility for employer contributions.

We'd Like to Talk to You

ERISA EXPERIENCE: You have extensive knowledge to protect the interests of the employee benefit plan participants and their beneficiaries.

ACCOUNTING: You have solid knowledge of accounting principles to reconcile and balance tax statements, employee benefits trust administration, pension laws, and recordkeeping procedures.

COMMUNICATION: You will need exceptional verbal and written communication to express yourself clearly and concisely to internal and external clients.

FINANCIAL ANALYSIS: You will need to be good with numbers to perform complicated mathematical calculations and to learn complex technical information.

Education & Experience Requirements

This level of knowledge is normally acquired through completion of a Bachelor's Degree in Business or related field of study and 3-4 years of directly related experience in Trust Retirement Plan Administration or 9-10 years equivalent combination of education and experience.

BOK Financial is a stable and financially strong organization that provides excellent training and development to support building the long term careers of our employees. **With passion, skill and partnership you can make an impact on the success of the bank, our customers and your own career!**

BOK Financial is an equal opportunity employer. We are committed to providing equal employment opportunities for training, compensation, transfer, promotion and other aspects of employment for all qualified applicants and employees without regard to sex, race, color, religion, national origin, age, disability, sexual orientation, genetic information or veteran status.

Apply today <https://bit.ly/3jHvnz3> and take the first step towards your next career opportunity! Contact Aimee Schwartz at aschwartz@bokf.com for confidential consideration.

