



Position Announcement

March 2018

Position	Retirement Planning Consultant
Function	The primary function is to provide financial education and appropriate resources to members in our Pension Plan and Insurance Plans, aiding them in their goals to get them to and through retirement.
Scope of Duties	Duties include creating and administering a financial planning program that empowers members in their retirement readiness preparations. Identifying and promoting appropriate financial planning tools (i.e. pension recordkeeping interface, Money Tree software, and other planning tools), while supporting participants in meeting their personal financial goals.
Knowledge/ Experience	<p>The ideal candidate will have an undergraduate degree in business and a strong working knowledge of financial planning/investments. Additional designations will be required to obtain (i.e. CRPC or CFP). This position requires a person who enjoys working with people; is detail oriented and has the ability to prioritize workloads; proficient with computer systems and applications; and exceptional organizational skills. Impeccable follow-up abilities are a must.</p> <p>We are seeking candidates with strong verbal and written communications skills, proficiency in Microsoft Office Suite, and a demonstrated track record of providing superior customer service and a willingness and ability to expand knowledge and effectiveness through classes and workshops. Current and active membership in the Church of the Brethren is preferred; current and active membership in a faith community is required.</p>
Travel	This position requires some business travel.
Description	This is a full-time, exempt position based in Elgin, Ill., for a not-for-profit, faith-based organization that provides Pension, Insurance, and Foundation services for 5,000 individuals and client organizations nationwide. This position reports to the Director of Client Relations.
About BBT	Church of the Brethren Benefit Trust is a great environment, family friendly, is a rewarding/meaningful place to work, and is located in an attractive office with easy access to I-90.
Salary/ Benefits	Salary and benefits are competitive with organizations of comparable size and scope of services. A full benefits package is included.
Applying	Please send a letter of interest, résumé, three professional references, and salary-range expectation to Donna March at 1505 Dundee Ave., Elgin, IL 60120, or dmarch@cobbt.org . For more information about Brethren Benefit Trust, visit www.cobbt.org .