

## Employee Benefits Associate

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### ABOUT AGH:

As one of the top 225 CPA and advisory firms in the U.S., AGH has been serving closely held and privately-owned entrepreneurial firms and public sector organizations for more than 80 years. AGH is based in the central U.S., but the firm's reach and specialized expertise available to clients spans the globe. AGH's more than 130 professionals serve as trusted advisors and provide clients with a broad portfolio of tax, assurance and advisory services.

### A BEST PLACES WORK CULTURE:

To recruit and retain the top-notch talent that differentiates AGH in helping our clients succeed, we consciously work to make and keep AGH an employer of choice. We provide our employees with a culture of learning and development, contribution, collaboration and community involvement. AGH has been named one of the 100 Best Accounting Firms to Work For by Accounting Today and Best Companies Group on nine occasions. No other firm in the region has earned so many consecutive placements on this distinguished list.

### POSITION SUMMARY:

The Employee Benefits Associate will be responsible for addressing all areas of defined contribution plan administration in a daily environment including, but not limited to: quarterly valuations and participant statement preparation, testing, payroll allocations, trust accounting, distributions processing, and eligibility verification.

### ESSENTIAL RESPONSIBILITIES:

- Assisting clients (Plan Sponsors) with questions regarding their plan
- Plan document interpretation
- Assisting investment advisors
- Preparing audit packages and working with the auditor
- Transaction processing, as needed
- Verification of plan position reports daily
- Calculation of contributions
- Compliance testing
- Preparation of IRS Forms 5500, 5330, and 1099
- Prepare quarterly valuations and participant statements
- Answering phone calls assisting clients
- Additional tasks as required

### QUALIFICATIONS:

- College degree or have taken classes in finance, accounting, or business (preferred)
- 2-3 years of experience in record-keeping or related financial field required



- ASPPA credentials (preferred)
- Proven knowledge and experience with IRS and DOL regulations
- Excellent written and oral communication with clients and peers
- Strong mathematical skills
- Proven detail oriented and focused quality control
- Excellent customer service skills
- Proficient in Microsoft Word, Excel and Outlook
- Experience with Relius and Crystal Reports (preferred)

### WHY WORK FOR US:

At AGH, you'll find an environment where good work is rewarded, and growth is valued. AGH offers competitive wages to qualified individuals and the opportunity to grow professionally and personally through diverse work experiences and formal training. Our top five people initiatives are:

1. A challenging variety of work in a continuous learning environment
2. Career/life integration
3. Flexible work environment with great opportunity for advancement
4. Ability to make a difference with clients and influence the AGH culture
5. Individualized career pathing

