Bilingual Retirement Plan Services Representative

To develop knowledge of Vanguard's Institutional Investor Group, retirement plan products and services, the overall financial markets, and the related legal, tax, and regulatory issues in order to respond accurately and thoroughly to client inquiries.

Duties and Responsibilities

- Develops basic knowledge of Vanguard funds, products and services, the overall financial services industry through classroom training, on-the-job training, and self-study.
- Provides fund and investment performance information to participants by phone.
- Provides high quality client service across Institutional Participant Services by responding to participant phone inquiries and providing account and plan information from various information systems.
- Assists bilingual participants with account inquires and transactions, holds discussions of unique tax treatments and plan provisions, as well as, translation of Vanguard.com, plan rules, and plan documents and forms.
- Responds to plan participant inquiries pertaining to certain legal, regulatory, and tax related issues through verbal and written communication.
- Identifies routine participant needs/problems with urgency, professionalism, and efficiency; determining alternative solutions; resolving the problem using current workflow procedures.
- Initiates transactions for participants including enrollments, exchanges, allocations, loans, withdrawals and terminations.
- Works with the various areas of the Institutional Division to enhance overall quality and workflow efficiencies.
- Appropriately utilizes management, resources and specialty resolution teams needed to resolve participant inquiries.
- Provides industry knowledge to fund performance and retirement investing.
- Participates in special projects and performs other duties as assigned.

Qualifications

- Undergraduate degree or equivalent combination of training and experience in an investment field is preferred. High school diploma or GED required.
- Minimum one year general experience. Prior customer service experience, preferably in financial services is preferred.
- Ability to obtain Series 6 & 63 licensing within department guidelines.
- Ability to relate, empathize and quickly build rapport with participants.
- Effective listening and probing skills to identify cues, understand needs and provide relevant solutions.
- Passion for the financial services industry and a desire to help participants reach their financial goals through the highest standards of ethics and integrity.
- Demonstrates the highest standards of ethics and integrity.
- Working knowledge of computer and related software applications.
- Excellent verbal/written communication skills.
- Demonstrated sound judgment and analytical skills.
- Ability to multitask in a highly visible, fast paced, team oriented environment.
- Ability to work effectively with others as a member of a team.
- Bilingual (Spanish/English) skills are required.

Special Factors
Overtime occasionally required.

Vanguard is not offering visa sponsorship for this position.