

**Position: Compliance Analyst**

**Location: Methuen, MA**

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## **Borislow Insurance Overview**

Borislow Insurance (BI) is a leading employee benefits brokerage and consulting firm. For nearly 39 years, we have served clients across a wide variety of industries and geographic areas. We are strategic advisors featuring multiple subject matter expert practices that are integrated as one team to deliver our unique value proposition to our clients. Our team's deep knowledge and experience is central to our ability to lead our clients in bringing them innovative solutions to their complex challenges. We are passionately committed to building long-term client relationships based on the highest levels of integrity, superior service, and exemplary performance – all done with a true sense of urgency and a personal touch. At a time of great uncertainty, change, and opportunity in the healthcare and insurance industry, BI remains among the fastest growing and most respected employee benefits agencies both locally and nationally.

The firm is currently seeking a positive, dynamic, and creative Compliance Analyst to work as part of the Borislow Insurance team.

**Position Overview:** The Compliance Analyst position, located in the Compliance Practice, is responsible for working with clients to complete government Form 5500 filings for Health & Welfare plans. The Compliance Analyst works on plans with moderate complexity and is responsible for keeping current with ERISA, DOL, and IRS regulations. This position is also responsible for managing the relationships with clients' service providers. The Compliance Analyst is also responsible for acting as a technical resource for clients and various internal colleagues.

### **Responsibilities:**

- Accurately and efficiently assist in preparing Form 5500 filings and provide related consulting for health and welfare plans liaising with Client Consultants, Vendors and Clients to collect data required to complete filings;
- Works with minimal supervision and effectively prioritizes workload based upon urgency, client importance, client expectations and team goals;
- Act as a resource for questions regarding 5500 services to our internal colleagues as well as the Compliance Practice team;
- Keep current with ERISA, DOL, and IRS regulations in regard to 5500 reporting;
- Provide general data entry support for the Compliance Practice;
- Work on special projects as needed;
- Assist in preparing Excel, PowerPoint and Publisher presentation materials in a timely manner to meet client deliverable deadlines;
- Organize and maintain files and in BI's Agency Management System;



- Provide backup phone support; and
- Additional duties as assigned.

### **Education:**

Bachelor's Degree preferred with some experience in Form 5500 preparation  
Associate's Degree (or other 2-year degree preferably in paralegal studies)  
Paralegal Certificate

### **Qualifications:**

- Experience in an ERISA paralegal role is highly desirable.
- Moderate knowledge of Form 5500 reporting and regulations.
- Knowledge of ERISA and Internal Revenue Code regulations and administrative best practices preferred.
- Able to apply proficient to in-depth knowledge of primary 5500 concepts, theories, and practices of professional/technical discipline.
- Able to analyze constantly changing information and propose solutions to meet the needs of our internal and external clients.
- Strong oral and written communication skills as well as excellent interpersonal skills at all levels of business, including interacting with staff and external business parties including clients.
- Strong focus on quality, details, and meeting client expectations.
- Demonstrate a strong customer service approach.
- Demonstrate strong and effective organizational skills and time-management.
- Ability to balance and prioritize multiple client relationships and associated tasks.
- Able to be a team player who puts clients' needs first.
- Strong PC skills including Microsoft applications.

### **Compensation and Benefits:**

Borislow Insurance offers a diverse working environment, and the chance to build a career where individual achievements are recognized and rewarded. You will enjoy a competitive compensation package, comprehensive benefits and an opportunity for career growth with a progressive industry leader.