WILLIAM ROEBELEN

121 Carriage Way · Windsor, CT 06095 · (413) 531-6880 · williamroebelen@sbcglobal.net

PROFESSIONAL SUMMARY

Relationship Manager/Customer Service Specialist/Finance Professional

- Extensive record of success as a relationship manager working with corporations and nonprofit entities to coordinate retirement services
- Skilled communicator, leader, and creative problem solver with excellent verbal, written, and organizational skills
- Finance and Investment Specialist, professionally trained to introduce and implement services for company employee benefit programs
- Proven ability to work collaboratively, independently and to manage multiple priorities under time constraints
- Goal/result/deadline-oriented, prudent fiscal budget manager, discreet with highly confidential information and materials
- Extensive experience understanding and managing client base revenue

PROFESSIONAL SKILLS AND CORE COMPETENCIES

Program Development / Budget Management	Regulatory and Compliance Analysis	Sales / Marketing
Leadership / Employee Management	Data Analysis / Financial Planning	Presentation Skills / Plan Reporting
Strategic Planning / Goal Alignment	Investment Review and Analysis	Public Speaking / Customer Service
Event Coordination / Scheduling / Logistics	Employee Hiring / Mentoring	Conflict and Problem Resolution

PROFESSIONAL EXPERIENCE

Director of Relationship Management - MassMutual Financial Group, Springfield, MA 2001–8/2016

- Manage the implementation, execution and maintenance of retirement plans, which includes pension, money purchase, 403(b) and 401(k) plans
- Lead service team of investment, actuarial, finance, account management, regulatory, marketing and education specialists
- Develop and present business plans designed to meet client fiduciary obligations, optimize ease of administration and maximize employer and employee knowledge and appreciation of the retirement plans
- Understand, educate and guide employers concerning new and existing regulatory, compliance and plan design considerations
- Introduce and enhance investment and retirement services products
- Develop and implement employee communication and education plans which include onsite meetings
- Relationship Manager for three billion dollar MassMutual retirement plans (2004-2009)
- Responsible for book of business of clients ranging in size from 75 million to 1 billion dollars

Director of Retirement Services - Strong Capital Management, Menomonee Falls, WI 1998–2001

- Managed retirement service account management and financial teams of more than 30 professionals supporting clients with more than one billion dollars in assets. Implemented new fund trading platform.

Director of Customer Services - American United Life, Indianapolis, IN 1996–1998

- Managed customer service teams of more than 30 professionals supporting 2000 clients, including Taft Hartley plans. Implemented automated recordkeeping system.

Director of Retirement Services - Allmerica Financial Services/The Shareholder Service Group, Worcester, MA 1993–1996

- During transition, managed team of more than 90 client service professionals servicing more than 300 clients and 40,000 participants. Key member of coordination team when The Shareholder Service Group acquired Allmerica Financial Services.

Operations Manager - Fidelity Institutional Retirement Services Company, Boston, MA 1992–1993

- Managed five account teams which provided 401(k) services to 30 clients, 50,000 participants and 2 billion dollars in assets.

Financial Control Manager - CIGNA Corporation, Hartford, CT 1985–1992

- Managed cash flow processing, financial and investment reporting and provided audit controls for retirement division.

RECOGNITIONS AND AWARDS

- Relationship Manager of the Year, MassMutual Financial Group, Springfield, MA - 2007
- Vice President of MassMutual Toastmasters Club 2014 - present
- Developed outstanding client relationships and references

EDUCATION

University of Maine, Orono, ME
MBA in Finance and Human Resource Management

University of Maine, Orono, ME
Bachelor of Science in Wildlife Biology

LICENSES: FINRA Series 6, 7, 63