



TPA Client Specialist

Eagle Rock Bank is growing, come join our team!

Eagle Rock Bank is a locally owned and managed community bank with strong values and a commitment to employees who join our bank family. Eagle Rock has proudly served the community since 1996, with locations in Rochester, Stewartville and a LPO/DPO in St. Louis Park, MN.

Job Title: TPA Client Specialist

FLSA Status: Non-Exempt

Schedule: Full-Time

Position Summary

The **TPA Client Specialist** serves as the primary point of contact for Third-Party Administrators (TPAs) and supports the end-to-end administration of deposit accounts and business services for clients. This role requires exceptional attention to detail, strong customer service skills, and a working knowledge of business banking products and digital platforms. The specialist plays a key part in ensuring operational accuracy and timely service delivery for both TPAs and clients in a high-touch private banking environment.

Duties and Responsibilities

- Act as the main liaison for Third-Party Administrators (TPAs), maintaining professional and responsive communication.
- Open and service new deposit accounts, ensuring completion of all required paperwork, agreements, and application checklists in accordance with internal procedures and compliance standards.
- Set up online banking profiles for clients and users, including user access rights, authentication, and training as needed.
- Maintain a thorough understanding of the bank's business services products (ACH, wire transfers, remote deposit, etc.) to support client onboarding and ongoing service needs.
- Manage ongoing account maintenance requests, including signatory changes, address updates, and service modifications.
- Generate, distribute, and review internal and client-facing reports related to account activity, audits, and service metrics.
- Conduct or assist with Third-Party Sender Annual ACH Audits, ensuring compliance with NACHA rules and internal audit requirements.
- Deliver exceptional customer service, demonstrating professionalism, timeliness, and a solution-oriented approach in all client and TPA interactions.
- Partner closely with internal teams (operations, compliance, relationship managers) to resolve issues and streamline processes.
- Troubleshoot and resolve issues related to business banking services, such as ACH file submissions, remote deposit capture, and online wire templates.
- Perform regular reviews of system setup and exception reports; implement updates and adjustments as appropriate.
- Perform other duties as assigned.

Qualifications:

- Bachelor's degree in Business, Finance, or related field, or equivalent work experience.
- 3+ years of experience in banking, financial services, or TPA-related roles.
- Solid understanding of deposit account operations, online banking systems, and ACH/wire functionality.

- Experience working with TPAs, retirement plans, or third-party service providers is strongly preferred.
- Strong analytical and organizational skills, with a high level of attention to detail.
- Excellent written and verbal communication skills.
- Proficiency in Microsoft Office (Excel, Word, Outlook); experience with banking platforms a plus.
- Ability to manage multiple tasks in a deadline-driven environment while maintaining a client-first attitude.

Preferred Qualifications:

- Familiarity with NACHA rules and audit processes.
- Working knowledge of private banking or high-net-worth client services.
- Experience with digital onboarding platforms or business banking tools.

Working Conditions

Must be able to stand and/or sit for extended period of time. Occasional heavy lifting required. Job requires employee to bend forward by bending forward at the waist, or by bending the legs and spine. Must be able to express ideas by the spoken word, and requires perception of speech.

Eagle Rock Bank offers a comprehensive benefit package to our full time employees:

- Medical * Dental * Vision
- Paid Time Off
- Paid Federal Holidays
- Life Insurance
- Short Term and Long Term Disability
- Flexible Spending Accounts
- 401k Retirement Savings Plan
- Employee Referral Program
- Educational Assistance
- Employee Birthday Pay
- Employee Wellness Allowance

Eagle Rock Bank is an Equal Opportunity Employer

www.eaglerock.bank