

Form Name: Katie School Student Opportunity  
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IP Address: 173.28.111.155  
Unique ID: 1286478264  
Location: 41.3421, -88.8426

## Katie School Student Opportunity

<b>Company Name</b>	Potthoff Financial Group
<b>Contact Person</b>	Luke Dobrich
<b>Title of Contact</b>	Operations
<b>Email</b>	z_ltd@outlook.com
<b>Phone</b>	(773) 326-7507
<b>Address</b>	110 E Main St. Ste 220 Ottawa, IL 61350
<b>Company Website</b>	<a href="https://www.northwesternmutual.com/financial/advisor/nick-potthoff/">https://www.northwesternmutual.com/financial/advisor/nick-potthoff/</a>
<b>Indicate what opportunity is available</b>	Full-time
<b>Title of Available Position</b>	Insurance Client Service Representative
<b>Opportunity Location</b>	Ottawa, IL w. Hybrid Option Possible
<b>Salary/Wage Range</b>	\$55k - \$60k
<b>Opportunity Start Date:</b>	Flexible
<b>Opportunity End Date</b>	When filled

## Description of Opportunity

Potthoff Financial Group is a Wealth Management firm affiliated with Northwestern Mutual.

The Insurance Client Service Representative specializes in client service to ensure the maintenance of an efficient, organized office that allows the financial representatives to focus their energy on building client relationships. The CSR is a liaison between the home office, financial representative, network office support team and clients. Specific responsibilities may include but are not limited to:

- Review insurance applications, conversions and policy changes for completeness and accuracy and return to representative for any missing information
- Arrange medical, paramedical and any exams necessary for underwriting
- Provide current status and account values for non-securities related accounts
- Contact clients regarding late payments
- Process incoming non-securities related insurance service requests from clients (process address changes, bank change information, loan requests and ISA service inquiries)
- Prepare account summaries for variable and securities owners

Benefits: 401(k) w. Match, Health Insurance, PTO, Profit Share Bonus, Flexible Hours

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## Preferred Skills

Qualifications:

- Experience in administrative support or customer service, preferably in the insurance industry
- Health and life insurance licensed or obtain licensing within 6 months of employment
- Excellent oral and written communication skills
- Familiarity with Microsoft applications and data entry and information retrieval software
- Demonstrated organizational and time management skills and ability to multitask, set priorities and meet deadlines
- Strong attention to detail with the ability to work with a high degree of accuracy
- Ability to work in a fast-paced environment
- Ability to work both independently and on a team
- Ability to maintain confidentiality
- Continue insurance education through schools, academies, licenses, registrations, and designations

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## Please Specify How You Would Like Students to Apply

Email resumes to Luke Dobrich.  
Email: z\_ltd@outlook.com  
Office Phone: 815.433.4325

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