Form Name:	Katie School Student Opportunity
Submission Time:	November 13, 2024 3:04 pm
Browser:	Chrome 130.0.0.0 / Windows
IP Address:	173.28.111.155
Unique ID:	1286480596
Location:	41.3421, -88.8426

Katie School Student Opportunity

Company Name	Potthoff Financial Group
Contact Person	Luke Dobrich
Title of Contact	Operations
Email	z_ltd@outlook.com
Phone	(773) 326-7507
Address	110 E Main St. Ste 220 Ottawa, IL 61350
Company Website	https://www.northwesternmutual.com/financial/advisor/nick-potthoff/
Indicate what opportunity is available	Full-time
Title of Available Position	Client Service Representative
Opportunity Location	Ottawa, IL w. Hybrid Options Possible
Salary/Wage Range	$60k-$65k
Opportunity Start Date:	Flexible
Opportunity End Date	When filled

Description of Opportunity

Potthoff Financial Group is a Wealth Management Firm affiliated with Northwestern Mutual. The Client Service Representative (CSR) 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. The primary role is to assist the firm's lead advisors in the onboarding and on-going servicing of its clients. Specific responsibilities may include but are not limited to:

• Prepare and review client investment onboarding forms for completeness and accuracy
• At the lead advisors' direction, initiate investment transfers, exchanges, and money movement requests
• Process incoming investment checks in collaboration with the network office and Northwestern Mutual home office
• Work with Northwestern Mutual home office and network office to resolve client account issues
• 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
• 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 investment, insurance, and planning clients

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

*Career Development and Promotion Potential available in this growing firm

Preferred Skills	Qualifications: • Experience in administrative support or customer service, preferably in the financial services and/or 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, 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 investment and insurance education through schools, academies, licenses, registrations, and designations • We highly value candidates with a four-year college degree and/or financial industry experience and will give special attention to those who possess this qualification
Please Specify How You Would Like Students to Apply	Please send resumes to Luke Dobrich. Email: z_ltd@outlook.com Office Phone: 815.433.4325