



WEALTH MANAGEMENT GROUP, INC.

### Position Description

Title: Client Service Associate  
Reports To: Client Service Coordinator  
Status: Full-Time; Monday-Friday, 9:00am-5:00pm  
Salary: \$40,000 - \$50,000 depending on experience

### Job Summary

We are currently looking for someone with great personality, exceptional client service, and the willingness to learn in a fast-paced environment. We are a small firm where everyone has a strong work ethic, passion for our jobs, and deep care for our clients. We offer top of the line service and have fun while doing it.

### Duties and Responsibilities

- ✓ Put clients' interest first.
- ✓ Provide amazing service to our clients.
- ✓ Assist clients and advisory team with all non-advisory questions and paperwork, such as processing forms, opening accounts, moving money, changing beneficiaries, and more.
- ✓ Prepare information for client financial review meetings, such as savings progress, required minimum distribution status, charitable giving history, and more.
- ✓ Maintain Client Relationship Management (CRM) database for sorting, reporting, scheduling, and marketing purposes.
- ✓ Update CRM database following client financial review meetings to ensure all tasks are properly assigned to team members.
- ✓ Track client service issues and new business transactions in progress.
- ✓ Create and update new operational procedures and workflows.
- ✓ Answer phone calls as needed.

### Qualifications

- ✓ Over five years of work experience
- ✓ Strict confidentiality of clients' information
- ✓ Incredible attention to detail
- ✓ Strong organizational skills
- ✓ Efficient with Microsoft Office (Word, Excel, PowerPoint, Outlook)
- ✓ Willingness and desire to learn new technologies

### Benefits

- ✓ Comprehensive medical, dental, vision, prescription, and life insurance. 100% paid by the company.
- ✓ 401(k) retirement plan with a 3% automatic company contribution after six months of service.
- ✓ Paid Holidays and Vacation: We are closed every day the New York Stock Exchange is closed. In addition, during the first year, we provide 10 days of paid vacation. After one year of service, we provide 15 days of paid vacation.

[hurlowwealth.com](http://hurlowwealth.com)

3925 Hagan Street, Suite 300      50 East 91<sup>st</sup> Street, Suite 205  
Bloomington, IN 47401      Indianapolis, IN 46240  
(812) 333-4726      (317) 550-1833



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### How to Apply

Interested applicants should send their résumés with a cover letter to Hurlow Wealth Management Group, 3925 Hagan Street, Suite 300, Bloomington, IN 47401 or email to [gnesbit@hurlowwealth.com](mailto:gnesbit@hurlowwealth.com). No phone calls please.

### About Hurlow Wealth Management Group

Hurlow Wealth Management Group is a small, collaborative team of financial planners, portfolio managers, and operations/administrative staff focused on helping our clients achieve their financial goals. We offer a clear, realizable career path for our employees based on measurable performance objectives. We provide training, mentorship, and educational opportunities, with a preference of promoting from within our talent pool. At Hurlow Wealth Management Group, we combine talented staff with industry-leading technology to offer our clients a superior experience.

Hurlow Wealth Management Group is an Equal Opportunity Employer, offering employment without regard to race, color, religion, sex, physical or mental disability, age, citizenship, pregnancy, genetic information, veteran status, gender identity, gender expression, sexual orientation, national origin, and any other protected status. This policy of nondiscrimination applies to all aspects of the employment relationship, including but not limited to, recruiting, hiring, training, advancement, promotion, demotion, transfer, selection for lay-off, termination, compensation, and benefits. We comply with all laws prohibiting discrimination.

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