

Hurlow

WEALTH MANAGEMENT GROUP, INC.

hurlowwealth.com

POSITION DESCRIPTION

Title: Client Associate

Reports to: Firm Partners, John Hurlow and Michael Carson

Works Alongside: Client Service Coordinators, Sue McCullough and Laura Swift

Status: Part-Time, Hourly (\$15/hour)

Why Work for our Firm?

Hurlow Wealth Management Group is a small, collaborative team of financial planners, portfolio managers, and operations/administrative staff focused on meeting our clients' 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 in partnership with industry-leading technology to offer our clients a superior experience.

Job Summary

We are looking for someone with great personality, exceptional phone etiquette with clients, 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 client service and have fun while doing it.

This position is one of the most important in the firm. The Client Associate is responsible for setting a positive first impression with potential clients and demonstrating thoughtfulness with current clients calling our office. We pride ourselves on outstanding client service and we need someone who can enthusiastically uphold our firm's values: client-first attitude, respect towards clients and visitors alike, genuine approachability, and caring demeanor.

Duties and Responsibilities

- ✓ Answer incoming phone calls
- ✓ Schedule client meetings via phone and email
- ✓ Scan and organize documents
- ✓ Sort and distribute incoming mail
- ✓ Manage the company calendar
- ✓ Prepare client meeting materials (print, bind, organize)
- ✓ Prepare and send client/potential client mailings
- ✓ Become proficient in firm's CRM system - Junxure.

Qualifications

- ✓ Strong written and verbal communication skills
- ✓ Exceptional phone etiquette
- ✓ Client-first attitude
- ✓ Initiative to research and resolve issues
- ✓ Ability to maintain strict confidentiality of clients' information
- ✓ Impeccable attention to detail
- ✓ Strong organizational skills
- ✓ Proficiency with Microsoft Office (Word, Outlook, Power Point, etc.)
- ✓ Willingness and desire to learn new technologies

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Salary and Benefits

- ✓ The hourly wage for this position is \$15/hour
- ✓ Our firm offers a retirement plan with a dollar-for-dollar match on the first 3% of salary deferrals. You will become eligible for the retirement plan after one year of service.
- ✓ Vacation days and holidays are unpaid. The amount of days is negotiable.

How to Apply

This position is open immediately and until filled. To apply, send resume and cover letter to:

Hurlow Wealth Management Group, Inc.
3925 Hagan Street, Suite 300
Bloomington, IN 47401

OR

lsswift@hurlowwealth.com

No phone calls, please.

Hurlow Wealth Management Group, Inc. is an Equal Opportunity Employer

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