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CLIENT ENGAGEMENT AND OFFICE MANAGEMENT

OUR COMPANY

At Zeutenhorst Financial, we believe in empowering others through life with purpose. We strive to simplify the complex, whether it be insurance, investments, or business management services. With over 50 years combined experience, our financial advisors and staff work with individuals and families to help lay out a plan that outlines their goals and set a course for achievement.

The environment at the office is that of a family who work together, building off each other's God-given gifts and talents to serve our clients. From celebrating personal milestones to sharing a prayer request at an optional weekly staff prayer meeting, we bring the philosophy of 'doing the next right thing' for the client and each other and in doing so add value to our clients' lives.

POSITION SUMMARY

The Client Engagement and Office Management position at Zeutenhorst Financial is dedicated to fostering client relationships and ensuring efficient front desk operations. The Specialist/Receptionist works to attract clients, build trusted relationships, and promote advocacy for our firm, while also managing schedules, handling inquiries, and maintaining a welcoming office environment.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Specific duties include, but may not be limited to:

- **Client Meeting Prep (30%)**
 - Time block calendar and schedule appointments with clients
 - Manage Advisors' calendars
 - Prepare for client meetings, including compiling account statements and other review documents and forms
 - Pre & Post meeting client communication & documentation
 - Host client meetings, order lunch and drinks for staff and guests when appropriate
- **Client Services (30%)**
 - Answer and transfer phones
 - Monitor communications of Advisors (emails, phone calls)
 - Perform prospect research
 - Track pending prospect activity
 - Coordinate client appreciation gifts
 - Be a cheerleader for our firm
 - Other tasks as assigned

- **Office Management (20%)**
 - Maintain organization and inventory in office space
 - Track continuing education
 - Pay bills
- **Marketing (20%)**
 - Organize, advertise for, and oversee corporate events
 - Ideate, create, and/or edit content for social media, webinars, email campaigns, and marketing collateral
 - Maintain website
 - Coordinate sponsorships and charity activities
 - Manage the marketing calendar
 - Track progress with marketing efforts
 - Design presentations
 - Maintain client contact database list
 - Develop referral leverage list
 - Follow up with client referrals and event participants

MINIMUM QUALIFICATIONS (KNOWLEDGE, SKILLS, AND ABILITY)

- Demonstrated strong verbal and written communication skills
- Welcoming and professional demeanor
- Strong attention to details, task-management skills, organization, and problem-solving
- Creative ideas about marketing content
- Track record of balancing multiple priorities simultaneously, accommodating unexpected requests or needs, and following through
- Eagerness to learn and grow
- Proficiency in the Microsoft Office Suite and Canva; knowledge of Salesforce CRM is a plus
- Two years of work experience in an office setting

Hours: Full time, in person

Flexibility: Family-friendly organization

Salary: Pay ranges depending on experience

NOTE

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an "at will" relationship. Equal opportunity employer. M/F/D/V.

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