

Receptionist

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. Established in 1981, our financial advisors and staff work with individuals and families to help lay out a plan that outlines their goals and sets a course for achievement.

Job Summary

The Receptionist is responsible for greeting visitors, answering incoming calls, and ensuring the front desk runs efficiently. This role involves managing schedules, handling inquiries, and always maintaining a professional and friendly demeanor. The ideal candidate will possess strong communication skills, attention to detail, and the ability to multitask in a fast-paced environment. Additional responsibilities include account servicing tasks for life insurance policies and annuities and administrative tasks, such as data entry, filing, and coordinating office supplies.

Key Responsibilities:

* **Customer Service**: Greet visitors warmly and assist with inquiries or direct them to the appropriate department.
* **Phone Management**: Answer and transfer calls professionally, take messages, and handle correspondence.
* **Scheduling and Coordination**: Manage appointments and meeting room bookings, obtain and organize files and statements for meetings.
* **Administrative Support**: Perform tasks such as entering data, filing (physical and electronic), organizing office supplies, paying bills, and applying payments to invoices.
* **Policy Servicing:** Process beneficiary changes, address changes, and account contributions; obtain statements and policy illustrations; correspond with insurance carriers; and other account maintenance for existing annuities and life insurance policies.
* **Office Maintenance**: Ensure the reception and meeting areas are always tidy and presentable.

Required Skills:

* Strong verbal and written communication skills.
* Excellent organizational and multitasking abilities.
* Proficiency in office software (Outlook) and aptitude for learning industry software.
* Professional and approachable demeanor.
* Attention to detail and ability to follow multi-step processes independently.
* Ability to handle confidential information responsibly.

Education and Experience

* High School Diploma or equivalent.
* At least two years of work experience in an office where you’ve had to manage files, or the office
* On-the-Job Training

Physical Requirements

* Prolonged periods sitting at a desk and working on a computer.
* Must be able to lift to 15 pounds at a time.

**Hours:** Full time, in-person

**Flexibility:** Family-friendly organization

**Salary:** Pay ranges depending on experience

This job description in no way states or implies that these are the only duties to be performed by the employee hired for 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 employee will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may be modified for individuals for whom the requirement poses a direct threat or significant risk to the health or safety of the individual 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.

*Zeutenhorst Financial is an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, national origin, disability, protected veteran status, sexual orientation, age, or any other characteristic protected by law.*

*This job description is subject to change at any time.*

PPG-8402699.1(9/25)(Exp.9/29)