



# HANTZ FINANCIAL SERVICES<sup>®</sup>

## FAMILY OFFICE INTERN

Summer Internship in our Headquarters

Hantz Group is a Michigan-based financial company that works with individuals and businesses to help them achieve their financial goals. We are a Family Office that offers a multitude of services tailored to each individual client. We deliver a team of professionals that are experts in their specific disciplines, yet work in collaboration to coordinate superior outcomes for our clients. By taking our holistic approach, we strive to reduce stress and save time for our clients so that they can focus on what's most important for their families.

### AREAS OF FOCUS:

- Asset Management
- Insurance
- Cash Flow Analysis
- Estate Planning
- Financial Planning and Retirement
- Tax Strategy and Planning
- Debt Strategies
- Property and Casualty Insurance

### THE OPPORTUNITY:

At the Hantz Group we strive to live our mission of personal growth daily. You can expect our fast paced, ever changing environment to challenge you every day. You'll have the opportunity to develop a network of motivated individuals all striving towards growth not only within the business, but in every aspect of their lives.

### YOUR ROLE:

As an Intern, you will experience every area of our Family Office. This internship allows you the opportunity to explore various aspects of our company. Your work will include:

- Studying for and obtaining Property & Casualty license
- Develop and fine-tune presentation skills through a classroom setting
- Learning and presenting scripts revolving around an initial client meeting
- Assisting tax team with tax projections and gain knowledge around tax preparation
- Preparing portfolio analysis to be used in client meetings
- Gain knowledge on how to utilize company software as it relates to financial planning
- Beginning the client acquisition process through phoning activities
- Opportunities to sit in on various types of client meetings
- Attend weekly Lunch and Learns with various upper management personnel
- All other task assigned

### QUALIFICATIONS:

- Pursuing a Bachelor's Degree
- Strong oral and written communication skills
- Ability to manage time effectively and work independently
- Detail oriented and strong analytical problem solving skills
- Ability to take constructive criticism and adjust accordingly
- Proficient in Microsoft Office

The Company does not discriminate in employment opportunities or practices on the basis of race, color, religion, sex, national origin, age, height, weight, disability, marital status, or any other characteristic protected by law.