



HANTZ FINANCIAL SERVICES[®]

OPERATIONS INTERN

Part Time Internship throughout the School Year or
Full Time Summer Opportunities

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

As an Operations Intern you will work as a liaison between Financial Advisors and our Product Providers. This experience will broaden your knowledge about the financial services industry. Your position in operations department plays a distinctive role that contributes towards the overall success of the organization. Our flexible working hours will allow you to gain valuable hands on experience in the field while obtaining your degree. Full time summer opportunities are also available. Your work will include, but is not limited to:

ESSENTIAL JOB FUNCTIONS:

- Work as a Liaison for Financial Advisors and Product Providers
- Daily review of new business, for accuracy and compliance reviews then follow up with Product Providers and Financial Advisors to complete and settle transactions/ business
- Manage a case load of communications including phone calls, and emails from Financial Advisors, and Product Providers to provide critical support in the funding process of customer accounts
- Studying for and obtaining Property & Casualty license
- Opportunities for growth through acquiring FINRA Securities Licenses available
- Comply with all Industry Rules and Regulations
- All other tasks as assigned

EDUCATION / KNOWLEDGE & SKILLS:

- Pursuing a Bachelor's Degree
- Interest in pursuing a career in financial services
- Availability to work 20-25 hours a week
- Strong oral and written communication skills
- Effective time management skills and able to work independently
- Detail oriented and strong analytical problem solving skills
- Ability to complete industry licensing
- Ability to use constructive criticism to positively influence work
- 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.