



HANTZ FINANCIAL SERVICES®

PROPERTY & CASUALTY SPECIALIST

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

Quotes, issues and answers all questions related to the client policies

ESSENTIAL JOB FUNCTIONS:

- Quoting policies for the Financial Advisors within at least two days before meeting date
- Cancel policies when you receive a signed, written request from the client
- Communicate on a regular basis with Financial Advisors with regards to any missing information or any other issues
- Communicate with Insurance representatives with any questions or concerns about a policy
- Answer all calls related to Property & Casualty
- Faxing, mailing out any information pertaining to a policy
- Input policy data correctly and in a timely manner
- Periodically re-quote policies for Financial Advisors before meeting date
- All other task assigned

EDUCATION/KNOWLEDGE & SKILLS:

- High School Diploma/GED
- Ability to obtain Property and Casualty License
- Proficient in Microsoft Word, Excel, and Outlook

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.