



HANTZ FINANCIAL SERVICES[®]

PLANNING ANALYST INTERNSHIP

Part Time Internship throughout the School Year

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 a Planning Analyst, you will be integrated into the Family Office. Working closely with our Financial Advisors will broaden your knowledge about the financial services industry and the important part that Tax Planning and Insurance plays in a client's overall financial health. Our flexible working hours will allow you to gain valuable hands on experience in the field while obtaining your degree. Your work will include, but is not limited to:

ESSENTIAL JOB FUNCTIONS:

- Assist in booking appointments
- Participate in meeting prep
- Assist advisors with client services
- Coordinate business and meetings with advisors, tax team and estate planners
- 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.