



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

## PRACTICE MANAGER

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

### **ESSENTIAL JOB FUNCTIONS:**

- Assist in booking appointments for advisors
- Prepare declaration page quote sheet for meetings
- Market for property/casualty insurance service opportunities
- Assist advisors with client services
- Coordinate business and meetings with advisors, tax team and estate planners
- Market to companies for business opportunities
- Comply with All Industry Rules and Regulations
- All other tasks assigned

### **EDUCATION/KNOWLEDGE & SKILLS:**

- High School Diploma/GED
- Strong oral and written communication skills
- Strong organizational skills
- Basic database skills
- Proficient in Microsoft Office
- Must be Able to Obtain Required Licenses\*

\*Required Licenses- FINRA Securities Industry Essentials\*\*, FINRA Series 7\*\*, FINRA Series 66\*\*, State Life, Accident & Health, Variable Contracts, State Property & Casualty

*HFSI will sponsor and pay for all required licensing on a loan basis. The loan will be forgiven after one year of full time employment. Hours accumulated in an internship will not be counted toward the full time requirement.*

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.