HANTZ FINANCIAL SERVICES®

Retirement 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

Growing financial services company has various positions open in the Retirement Services division of its Southfield headquarters. As a Retirement Specialist you will assist with; business development, managing client relationships by working with internal team members and directly with clients.

Essential Job Functions:

- Assist corporate clients, their employees, and our employees with daily questions about specific retirement plans
- Monitor and assist clients with the setup of a new retirement plan or provider conversions
- Assist clients with annual year end administration
- Organize and prepare client service meetings and employee meetings
- Develop and manage client relationships, including ongoing and regular client contact and communication
- Review and consult with clients regarding their plan design, service providers, and employee education
- Perform daily client service activities which can include problem solving and identifying resolutions, reviewing plan documents, and annual compliance items
- All other tasks assigned

Education/Knowledge & Skills:

- Bachelor's Degree or Equivalent Experience
- Minimum three years of experience working with Defined Contribution and/or Defined Benefit plans
- Securities and insurance licensed* or willingness to obtain immediately
- Strong attention to detail
- Proficiency with Word, PowerPoint, Outlook and CRM software
- Self-starter, energetic, assertive
- Team player, excellent people skills

(*)Required Licenses- FINRA Series 7(**), FINRA Series 66(**), State Life, Accident & Health, Variable Contracts
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.

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.