Hurlow

WEALTH MANAGEMENT GROUP, INC.

Position Description

Title:	Client Service Coordinator
Reports To:	Client Service Manager
Status:	Full-Time; Monday-Friday, 8:30am-5:00pm
Salary:	$45,000 - $60,000 depending on experience

Job Summary

We are currently looking for someone with great personality, exceptional client service, and the willingness to learn in a fast-paced environment. We are a small firm where everyone has a strong work ethic, passion for our jobs, and deep care for our clients. We offer top of the line service and have fun while doing it.

Duties and Responsibilities

- ✓ Put clients' interest first.
- ✓ Provide amazing service to our clients.
- ✓ Assist clients and advisory team with all non-advisory questions and paperwork, such as processing forms, opening accounts, moving money, changing beneficiaries, and more.
- ✓ Prepare information for client financial review meetings, such as savings progress, required minimum distribution status, charitable giving history, and more.
- ✓ Maintain Client Relationship Management (CRM) database for sorting, reporting, scheduling, and marketing purposes.
- ✓ Update CRM database following client financial review meetings to ensure all tasks are properly assigned to team members.
- ✓ Track client service issues and new business transactions in progress.
- ✓ Create and update new operational procedures and workflows.
- ✓ Answer phone calls as needed.

Qualifications

- ✓ Over five years of work experience
- ✓ Strict confidentiality of clients' information
- ✓ Incredible attention to detail
- ✓ Strong organizational skills
- ✓ Efficient with Microsoft Office (Word, Excel, PowerPoint, Outlook)
- ✓ Willingness and desire to learn new technologies

Benefits

- ✓ Comprehensive medical, dental, vision, prescription, and life insurance. 100% paid by the company.
- ✓ 401(k) retirement plan with 3% automatic company contribution after six months of service.
- ✓ Paid Holidays: We are closed every day the New York Stock Exchange is closed.
- ✓ Paid Time Off: Unlimited, after 90 days of employment.
- ✓ Paid Pregnancy Leave: Up to 12 weeks of paid leave.
- ✓ Paid Sabbatical: Up to four consecutive weeks, after five years of service.
- ✓ Paid professional development, such as advanced designations and annual conferences.

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Bloomington, IN 47401	Indianapolis, IN 46240
(812) 333-4726	(317) 550-1833

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How to Apply

Interested applicants should send their résumés with a cover letter to Hurlow Wealth Management Group, 3925 Hagan Street, Suite 300, Bloomington, IN 47401 or email to gnesbit@hurlowwealth.com. No phone calls please.

About Hurlow Wealth Management Group

Hurlow Wealth Management Group is a small, collaborative team of financial planners, portfolio managers, and operations/administrative staff focused on helping our clients achieve their financial goals. We offer a clear, realizable career path for our employees based on measurable performance objectives. We provide training, mentorship, and educational opportunities, with a preference of promoting from within our talent pool. At Hurlow Wealth Management Group, we combine talented staff with industry-leading technology to offer our clients a superior experience.