HWMC

HEARN WEALTH MANAGEMENT COMPANY

Designing Financial Strategies for Families and Small Business Owners

Financial Services Client Service Support and Administrative Assistant

This is a full or part time position, depending upon the candidate's preferences.

Must communicate clearly and positively with clients at a high customer service level via telephone, e-mail, letter and, when applicable, in person.

Maintain client, vendor and networking contacts information in Outlook and client files.

Prepare reports and analyses from Fidelity WealthCentral, Portfolio Center & AllocationMaster.

Assist in preparation for client meetings.

Prepare application forms for Investments, Annuities, and Life, Disability & Long Term Care Insurance.

Prepare investment illustrations and analyses in Excel.

Initiate illustrations life, disability and long term care insurances.

Ability to prioritize and multi-task with ability in a time efficient manner.

Administrative office functions – including but not limited to filing, phones, copies, mail, vendor interactions and scheduling, manage my calendar, maintain fax and printer.

Proficient in Excel, Word and Outlook.

Working knowledge of personal finances. Securities and Insurance licenses preferred, but not required.

Please e-mail resumé to e-mail address below:

John W. Hearn III, CPA, CFP®
HEARN WEALTH MANAGEMENT COMPANY
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