FINANCIAL REPRESENTATIVE ASSISTANT- INTERNSHIP

BELL & WRIGHT FINANCIAL GROUP

Northwestern Mutual

Securities Registration Not Required | Non-registered fingerprinted (NRF) person

WAGE= $18/HR

ENVIORNMENT: IN OFFICE (HYBRID/REMOTE POTENTIAL)

OVERALL FUNCTION

The financial representative assistant specializes in client service to ensure the maintenance of an efficient, organized office that allows the representative to focus his/her energy on building client relationships. The assistant is a liaison between the home office, financial representative, network office support team and clients. Specific responsibilities may include but are not be limited to:

SUPPORT

- Handle case notes, process correspondence and maintain client case files
- File new statements, account forms and other insurance/investment-related materials
- Maintain financial representative's calendar and schedule follow-up appointment
- Answer telephone calls and direct them as appropriate
- Process client/prospect reservations for marketing events such as seminars and assist in preparation of seminar materials and event mailings
- Maintain supplies of current insurance/investment-related marketing materials
- Input data, print proposals and gather information at direction of financial representative in preparation for client/prospect meeting
- Contact clients to set up follow-up meetings with representative
- Contact clients to confirm receipt of forms or request return of completed forms
- Maintain current client information for all product lines
- Monitor Daily Status Report (DSR) and expedite any additional underwriting requirements
- Communicate with home office, NMIS and fund families as needed to supply or obtain information
- Prepare/print letters of instruction for client signature
- Prepare policies for delivery
- Maintain check logs
- Send client birthday cards and schedule birthday/age change appointments for representative
- Generate lead letters and implement marketing programs

CLIENT SERVICE SUPPORT | NON-SECURITIES PRODUCTS

(Non-securities refers to Northwestern Mutual portfolio, fixed or non-variable insurance/products)

- Review insurance applications, conversions and policy changes for completeness and accuracy and return to representative for any missing information
- Arrange medical, paramedical and any exams necessary for underwriting
- Provide status and account values for non-securities related accounts
- Contact clients regarding late payments
- Process incoming non-securities related insurance service requests from clients (process address changes, bank change information, loan requests and ISA service inquiries

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QUALIFICATIONS

- Excellent oral and written communication skills
- Familiarity with Microsoft applications and data entry and information retrieval software
- Demonstrated organizational and time management skills and ability to multitask, set priorities and meet deadlines
- Strong attention to detail with the ability to work with a high degree of accuracy
- Ability to work in a fast-paced environment
- Ability to work both independently and on a team
- Ability to maintain confidentiality