

Form Name: Katie School Alumni Opportunity
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Katie School Alumni Opportunity

Company Name	Nicholas D. Potthoff - Northwestern Mutual
Contact Person	Luke Dobrich
Title of Contact	Operations - HR
Email	z_ltd@outlook.com
Phone	(773) 326-7507
Address	110 E Main St. Ste 220 Ottawa, IL 61350
Company Website	www.nickpotthoff.com
Indicate what opportunity is available	Full-time
Title of Available Position	Financial Planning Analyst
Opportunity Location	Ottawa, IL
Salary/Wage Range	\$65k-\$75k
Opportunity Start Date	ASAP
Description of Career Opportunity	<p>Financial Planning Analyst will work with our Wealth Management Advisors to deliver financial security to their clients through a comprehensive planning process that integrates investment and insurance products. Analysts help advisors increase productivity by providing planning and integrated operations support.</p> <p>Specific responsibilities include but will not be limited to:</p> <p>Comprehensive Financial Plan Preparation:</p> <ul style="list-style-type: none">• Collaborate with lead advisors to develop comprehensive financial plans aligned with industry best practices• Assist lead advisors in the development of the plan's goals, scenarios, and recommendations <p>Client Implementation:</p> <ul style="list-style-type: none">• Collaborate with lead advisors to provide proposals, Investment Policy Statements, insurance product illustrations, etc.• Prepare, or work with advisors to provide, all materials and information the advisors need to support the investment client onboarding and underwriting process• Process, or work with advisors to open/fund investment accounts and investment service requests such as fund disbursements and account transfers

Preferred Skills

- Bachelor's Degree in business, finance, and or/related field
- Strong attention to detail, accuracy, and reliability with the ability to thrive in a fast-paced environment
- Ability to manage multiple diverse projects and assignments in a timely and quality manner
- Ability to assess client financial situations and analyze portfolios to develop and implement comprehensive plans aligned with client goals
- Strong analytical, problem solving, and written communication skills, with the ability to work well with others

Please Specify How You Would Like Alumni to Apply

Please email resumes to:
z_ltd@outlook.com
