

Job Title: Client Service Associate	Job Level: Dependent on Experience
Location: Rhinelander, WI	Type of Position: Full Time
Exempt / Non Exempt: Exempt	Anticipated Start Date: 2021

## Background of Heck Capital Advisors

Heck Capital Advisors, LLC is an independent investment advisory firm with a strong foundation. We have been serving individual and institutional clients with comprehensive investment services from the heart of Wisconsin, where Robert Heck first began the family's investment legacy in the 1950's.

Heck Capital Advisors is uniquely positioned to develop an exceptional relationship with our clients while providing competitive employment opportunities for our employees. Client referrals are a testament to our work and have allowed us to cultivate a national reach – assets under management, consultation & advisement of over \$6.7 billion in assets with client relationships in 38 states.

## Essential Job Functions

The Client Service Associate is an integral part of the Operations and Client Service team. The team is responsible for assisting Advisors in all aspects of the firm with an emphasis on client service and administrative processes. We are seeking a candidate that is highly motivated, takes initiative, has a positive attitude, willing to work in a fast-paced environment and willing to take on new tasks and assignments. Job functions will include, but are not limited to:

- Provides administrative support for client requests and questions
- Assisting with administrative and operational duties in relation to client accounts, including but not limited to; money movements, data gathering & reporting, mailings, filing, scanning, copying, data entry, assistance with account reconciliation.
- Answers phone calls, schedules meetings
- Paperwork – new account and supplemental
- Misc. tasks as needed

## Requirements

- 3 years administrative experience preferred
- Attention to detail and accuracy a must
- Excellent problem solving skills
- Must be able to multi-task
- Computer skills: Microsoft Office, CRM programs (preferred), Adobe and the ability to learn and adapt to changes in technology
- Excellent oral and written communication skills
- Ensures Confidentiality with respect to all information pertaining to clients and potential clients
- Organizational skills
- Must be able to work as a team
- Registration & Licensing: Series 65 may be required for advancement

**How to Apply:**

Send Resume and Cover Letter to:

Heck Capital Advisors

Email: [heckcapital@heckcapital.com](mailto:heckcapital@heckcapital.com) (Attn: Stevie Radzinski)

PO Box 738

Rhineland, WI 54501

**Benefits:**

Insurance:	Health Insurance, Dental Insurance, Vision Insurance, Long & Short Term Disability
Leave & Holiday:	Sick Leave, Paid Holidays, Paid Vacation
Retirement & Financial:	401(k) Plan, HSA, Potential for Profit Sharing
Other:	Fitness Reimbursement