

Job Title: Client Service & Marketing Associate – Milwaukee Office

Department: Client Service & Operations

Job Requirements:

- Bachelor's degree or Associates degree required (or equivalent experience)
- Excellent oral, written, and interpersonal communication skills
- Computer skills: Typing, Microsoft Office, Client Relationship Manager (CRM), Adobe Creative Suite (InDesign, Illustrator, and Photoshop), Dreamweaver, and the ability to learn and adapt to changes in technology. Software specific training will be provided upon hire
- Registration and Licensing Requirement: Series 65 examination is preferred - time frame to be determined
- Ensures confidentiality with respect to all information pertaining to clients and potential clients

Job Description:

The Client Service and Marketing Associate is an integral part of the Operations and Client Service teams. The Associate will be responsible for assisting the Advisors in all aspects of the firm with an emphasis on the client service and administrative processes. This person will also play an integral role in all marketing initiatives and strategy.

Client Service/Administrative Responsibilities:

- Prepare and process client paperwork
- Perform daily checks and balances for client service team
- Schedule client/prospective client meetings for Advisors
- Order/inventory office supplies and work with building staff and vendors
- Print, bind, and prepare client books for meetings
- Complete ad-hoc client service requests on a daily basis

Marketing Responsibilities:

- Ability to help with RFPs and ad-hoc client requests
- Co-manage social media presence
- Administer ongoing Search Engine Optimization (SEO) and marketing strategy
- Identify and apply for business awards/recognition opportunities
- Desire to learn and master marketing software (Adobe InDesign) for all communication and branding requirements
- Contribute to weekly marketing committee tasks and projects

Rhineland
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P.O. Box 738 Rhineland, WI 54501

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Minneapolis
West End Plaza
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St. Louis Park, MN 55416

877.432.5330 toll-free
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Desired Qualifications:

We are seeking a candidate that is highly motivated, has a positive attitude, willing to work in a fast paced environment, and be willing to grow and take on new tasks and assignments. Desired attributes for this position include:

- Self-starter who takes pride in his/her work and desires to contribute to a team environment
- Excellent attention to detail and accuracy
- Demonstrated work ethic and ability to stay late or come early as work flows dictate
- Exceptional and proactive communicator with clients and team members
- Displays a willingness to learn Heck Capital's investment and planning resources
- Effective writer (ability to provide writing samples in interview process)
- Proven time-management skills and demonstrated ability to organize and prioritize multiple tasks

How to Apply:

Email Resume and Cover Letter to:

mbogard@heckcapital.com (Attn: Client Service & Marketing Associate)

Background of Heck Capital Advisors

Heck Capital Advisors, LLC is an independent registered 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's managers and advisors offer small-town values and an exceptional work ethic with competitive investment services for our clients.

Heck Capital Advisors is uniquely positioned to develop an exceptional relationship with our clients while providing competitive employment opportunities for our employees. While earning national respect for our firm, we have remained grounded in our Wisconsin values and excellent work ethic. Client referrals are a testament to our work and have allowed us to cultivate a national reach – investing and consulting to over \$4 billion in assets with client relationships in 30+ states.

For more information, please visit: www.heckcapital.com .

Benefits:

Insurance:	Health Insurance, Dental Insurance, Vision Insurance
Leave & Holiday:	Sick Leave, Paid Holidays, Paid Vacation
Retirement & Financial:	401(k) Plan, Profit Sharing

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