THE MENTZER GROUP LLC
Estate and Retirement Planning
A REGISTERED INVESTMENT ADVISOR

# ***Intern***
# ***Job Description & Duties***

- Work closely with operations and service team to make phone calls and schedule appointments. Some calls to existing clients and some will be leads and prospects to set up appointments.
- Learn how to complete new business client applications with help from back office support team.
- Sit in with advisors on client meetings.
  - Take operational and strategy notes and communicate to team as directed
- Organize and track new business and existing client workflow.
  - Track pending new business process, communicate with team and carriers as needed.
  - Call carriers and custodians for information often.
- Audit client files to identify new business opportunities.
  - Provide service and compliance checks.
- Complete various marketing tasks as directed.

**How to apply:**

- Send your resume with a brief note to jonathan@thementzergroup.com

- You may also call the number below and ask to speak with Jonathan to set up an interview

7632 Gleason Drive | Knoxville, TN 37919
TEL 865.240.2940 | FAX 865.240.2941
WWW.THEMENTZERGROUP.COM