

Lawley

INSURANCE | EMPLOYEE BENEFITS

Summer Temporary Position – Wealth Management

These are the *fundamental* components of the job:

- Our Wealth Management temporary supports the client group by shadowing the team and assisting with client service requests and special projects
- Position will have exposure to a variety of financial topics including but not limited to, portfolio management, retirement planning, insurance and risk management, and education planning

Position will have responsibility in the following areas, with training to be provided:

- Assist with running Morningstar Reports; review and study investment models and allocations
- Maintain technical analysis data and help work with Wholesalers to streamline product offerings
- Contribute in sourcing and vetting alternative investments
- Monitor Annuity offerings; develop and maintain weekly report of market events
- Review and report on Osaic's model portfolios and investment recommendations
- Streamline information with internal and external customers, carriers, managers and staff

Other *functions* of the job:

- Expand and grow in your role when supporting miscellaneous duties and administrative tasks as requested

Requirements that we value for this role:

- Enrolled college student with concentration in Business, finance focus preferred
- Knowledge of Microsoft Office, including Word, Excel, PowerPoint and experience navigating windows-based software
- We are seeking strong critical-thinking skills
- Individuals who work well individually as well as part of a team.
- Will be responsible to handle multiple tasks efficiently, and be effective in a fast-paced working environment where each day is different
- Precise communication skills even under time constraints, detail-oriented, and have a high degree of follow-through
- A passion to make customers and coworkers feel important and valued



A bit about Lawley!

'Lawley provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to age, race, creed, color, religion, sex, sexual orientation, national origin, citizenship, immigration status, gender identity or expression, military status, familial status, marital status, disability or genetics.'

- We are not a call center environment!
- We achieve success by building genuine relationships together, with our teams and clients
- We are a family owned insurance broker (nearly 70 years!)
- We are deeply committed to the communities we serve and love to get involved
- We work hard and play hard!!!

Why Lawley?

- Training, career development, and growth opportunities
- 32-hour work week, during the summer, Monday-Thursday between our business hours of 8am-4:30pm
- Comfortable, family-oriented culture, with an emphasis on work life balance
- Paid parking!

The compensation range for this is set at \$16/hr, and is based on 32 hours per week. Approximate dates of this assignment are June 3rd- August 16th 2024. Please note that post conditional employment offer, candidates will be asked to complete a criminal conviction questionnaire and submit fingerprints to Osaic.

'Lawley provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to age, race, creed, color, religion, sex, sexual orientation, national origin, citizenship, immigration status, gender identity or expression, military status, familial status, marital status, disability or genetics.'