Position Description:
• Assist the certified financial planners throughout the planning process from client engagement to financial plan implementation.
• Twenty hours per week for six months.
• Schedule flexible around school schedule.

Educational Requirements:
• Must be enrolled in an undergraduate financial planning degree program.
• Juniors and seniors preferred.

Other Requirements:
• Passionate about financial planning with a sincere desire to help others.
• Able to work in a team environment, be proactive, and ask questions.
• Desire to continually learn, grow, and stretch.
• Critical thinking skills and the ability to apply information.
• Proven ability to meet deadlines.
• Familiar with financial planning concepts and vocabulary.
• Exposure to financial planning software and client relationship management software.
• Able to use a financial calculator.
• Excellent written and oral skills.
• Previous internship experience preferred, but not required.

Primary Responsibilities:
• Process client data and input into financial planning software.
• Speak with clients on the phone to provide service, clarify data, and schedule appointments.
• Interpret a financial analysis and develop strategies and recommendations.
• Attend staff and training meetings as a full member of the team.

Opportunity to:
• Sit in on client meetings.
• Meet with certified financial planners for mentoring and career counseling.