

Join Our Team

Virtual Financial Scribe Internship



NORTHWESTERN MUTUAL PRIVATE CLIENT GROUP

Virtual Financial Planning Scribe Internship

(Ideal for rising Sophomores and Juniors)

- Gain hands on real-world exposure – Take case notes in live client meetings and learn about the planner client relationship by working closely with one of our many CFP®s before, during, and after client meetings.
- Put academic learning in practice – See concepts from your financial planning classes being applied in a real-world setting.
- Work virtually – Attend Zoom meetings, so you can balance your academic focus and internship during the school year.
- Make money: \$15/hour
- Availability Expectation: 4-6 hours a week (more if your schedule allows)
 - We are hiring for the Fall 2024 semester, and your internship will continue throughout your school year. Having a Summer Internship does not exclude you from applying

Apply now, Click here

- The application will begin with completing a one-hour assessment to reveal skills and aptitude and creating a one-minute video describing why you would be a good candidate.

What our past interns say

"CrossPoint's **scribe internship was vital in my development** as a financial advisor. It **provided valuable insight** into the relational side of financial planning and **allowed me to see the concepts we learned in class applied in the real world**. For **any student looking to better themselves** not only technically, but also relationally, the **scribe internship is one of the best opportunities available**." – *Andrew Koblyski, Virginia Tech Class of 2020*

"CrossPoint's **scribe internship was a unique experience that gave me a lot of insight into the client-advisor relationship**. At most internships you spend most of your day doing prep work and back-office activities, but with this you are always in client meetings. I remotely called into client meetings, summarized important information, and had helpful post-meeting discussions with the lead advisor. This helped me **hone my listening and observational skills** and looked great on my resume. Because of the flexible schedule I was able to work during the semester which gave me more work experience than many of my peers." – *Richard Grant, Virginia Tech Class of 2020*

"Joining CrossPoint for the **scribe internship helped me to gain valuable, real-world experience** while I was still in school. By taking meeting notes, I **developed a better understanding for how typical client meetings flow**, what kind of things most clients focus on and care about, and how to better connect with clients. I also learned about various financial planning topics, which **gave me a leg up in my classes**, especially Case. Being able to sit in on meetings has helped me in the first few months of my career, as I am better prepared to provide input and make quality contributions in client meetings and **provide better analysis outside of meetings**." – *Ryan Jordan, Virginia Tech Class of 2021*

"The financial **scribe internship has been the single most impactful educational experience** I have had in college. It has **allowed me to practice my communication skills** and see how the things we are taught in the classroom are put into practice in the real world. The **hours were very flexible and approachable** and allowed me to easily schedule meetings around classes while getting to scribe for successful advisors." – *Devin McCombs, Virginia Tech Class of 2022*

"My experience as a **scribe at CrossPoint made me so much more eager to become a financial planner**. Not only did it **solidify the technical knowledge I learned in the classroom**, but I also **got to witness how each financial planner uniquely interacts with their clients** and how they structure their meetings. I recommend the scribe internship to any future financial planner looking for a rewarding experience and **who wants to be a fly on the wall while advisors walk their clients through reaching their personal and financial goals**." – *Caleigh McDonough, Virginia Tech Class of 2022*

"I thoroughly enjoyed the opportunity to spend time with CrossPoint. The fact that I **was able to sit in actual client meetings was extremely enjoyable**, as I was able to learn not only the basics of how these meetings operate, but also the **management of client relationships and face-to-face interactions**. From a learning perspective, I feel extremely lucky. Being as young as I am, I have yet to take any courses on financial planning or anything related to the field. From the start, everything I heard during meetings was foreign information and **both Founders were always sure to spend time with me after the meeting answering any questions that I had**." – *Thomas Kellogg, Virginia Tech Class of 2024*



7 Team Members

+ 6 Interns

5 CFP®s

300 Plans/yr

Hybrid Model

- Investments + (\$425 AUM)
- Insurance (LI, DI, LTC)

Virtual Financial Planning Firm

- Richmond
- Clifton
- Blacksburg
- Charlottesville
- Martinsburg



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