

**Brennan Financial Services**  
**Financial Services Assistant**  
*Position open June, 2018*

The Financial Services Intern will be responsible for special projects and administrative work of a successful, growing financial planning practice with a highly motivated team. The role includes document creation and management, preparing the advisors for meetings, correspondence, onboarding new clients, assisting with an electronic document system, and maintaining current client data profiles. The ideal candidate will reinforce and advance the brand through superior service to our clients and other team members.

Major areas of responsibility include handling correspondence, supporting the team, and enforcing the team mission, values, and culture by exhibiting the following behaviors: positive attitude, diligence, responsiveness, collaboration, respect and accountability. The candidate will also project a professional company and team image through interactions with vendors and associates. Candidate should be detail-oriented, adept at following systems, experienced in customer service and financial services, and enjoy a fast-paced environment.

**AS A FINANCIAL SERVICES INTERN, YOU WILL:**

- Demonstrate complete confidentiality in all client and firm dealings
- Provide the highest level of client service and care in all areas
- Function as team support for financial advisors
- Prepare documents for recommendations made for clients
- Prepare for client meetings and deliver documents
- Assist in the process to onboard new clients
- Research investments as needed
- Participate in team projects to improve efficiency and quality of client service
- Utilize electronic systems such as Junxure, Outlook, Power Point, and E-Money for team and client management

**WHAT WE LOOK FOR:**

- Quick learner with ability to implement new technology with ease
- Great personal satisfaction from helping clients to achieve their goals
- Confident self starter with the ability to multi-task and lead projects
- Proficient knowledge of Microsoft Office (Word, PowerPoint, Outlook, Excel)
- Punctual and timely attendance with ability to vary schedule to meet team goals
- Excellent command of the English language with a professional communication style, both verbal and written
- Ability to organize and administer information and follow through with details

- Understands and follows all practice and firm policies and procedures
- Successful with minimal supervision

**FOR MORE INFORMATION ABOUT US:**

[www.debrabrennantagg.com](http://www.debrabrennantagg.com)

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