Job Title: Summer Intern - Wealth Management
Company: Cerity Partners
Location: Reston, Virginia and Midland, Texas

Are you a college student looking for a summer internship experience that will provide hands-on experience and exposure to various aspects of wealth management? Do you want to work with a collaborative team that believes in putting people first and holding each other accountable? Do you want to experience families and individuals achieve their financial goals? If yes, we believe you would be an outstanding fit for our internship program.

You will work as a **full-time summer intern** in our Reston, VA or Midland, TX office. We are seeking a hardworking and detail-oriented individual who is interested in learning about the operations of a full-service Wealth Management firm. You will learn by doing and will gain direct hands-on exposure to client prospecting, client onboarding, client billing, client portfolio management, and reporting.

The internship program is designed to provide you with valuable insights into the Wealth Management industry and allow you to develop key skills that will benefit your future career in the field.

Ideal Candidate Profile – "Our Casting Call!"

- Students pursuing a bachelor's or master's degree in financial planning, accounting, finance, economics, business, or a related field.
- Strong interest in wealth management, financial planning, and investment advisory services.
- Excellent analytical and problem-solving skills with the ability to interpret financial data.
- Humble team player who welcomes feedback with the goal of continuous improvement.
- Detail-oriented with strong verbal and written communication skills, professional presentation, and organizational skills
- Knowledge of financial markets, investment products, and industry trends is a plus.
- Relevant internships or work experience in finance or wealth management is preferred.
- Attitude that no task is too small and willingness to do whatever tasks necessary to make sure that the work is done on time.

Responsibilities:

- Client Support: Assist wealth advisors and relationship managers in providing exceptional service to clients by preparing client meeting materials, conducting research, and coordinating client communications.
- Investment Analysis: Contribute to investment research and analysis efforts by assisting with portfolio performance evaluations, asset allocation studies, and investment due diligence.
- Financial Planning: Participate in the financial planning process by gathering client information, preparing financial reports, and creating financial projections to support client goals and objectives.
- Market Research: Conduct market research and analysis to identify potential investment opportunities, monitor market trends, and assist in the development of investment strategies.
- Operations Support: Collaborate with operational teams to streamline processes, ensure accurate data entry, and assist in the management of client accounts.
- Compliance and Regulatory: Assist in the maintenance of compliance standards by reviewing documentation, verifying client information, and adhering to industry regulations.
- Team Collaboration: Collaborate with cross-functional teams within Cerity Partners, including investment professionals, financial planners, and operations staff, to support client needs and enhance service delivery.

Company Overview:
Cerity Partners is a leading, national registered investment advisory firm serving high-net-worth individuals and their families, businesses and their employees, and nonprofit organizations from its offices across the country. Our in-house experts of attorneys, tax advisors, financial planners and investment professionals are passionate about and committed to providing objective financial advice and oversight.

Our mission is to positively impact the financial well-being of our clients by delivering objective financial advice. Our culture allows us to deliver this mission. We believe in a simple formula that drives our actions and pushes us every day to do better than the day before: People First + Accountability = Winning Outcomes. We expect our team members to deliver on their responsibilities, understand how every component of our company works to generate success, and hold themselves and their colleagues accountable to the highest standards. As a result, we will enjoy talking to you if you:

- Understand the need to provide a world-class customer experience.
- Value the collaboration of insightful, experienced colleagues to deliver our services.
- Demonstrate a strong affinity in financial services, exceptional communication, organization, and prioritization skills.

We welcome others who share our mission and passion. Please submit resumes and cover letters through Hire Red Raiders for the upcoming Opportunity Days event.