# The Capital Chart Room, LTD®

### Financial Planning Intern

| **Location** | 2821 West 7th Street Suite 550, Fort Worth, TX 76107 |
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| **Job Title** | Financial Planning Intern |
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| Level/Grade | Internship-level position with consideration for advancement to full-time position. | Hours: 40 per week during the Summer 2019 semester: Approximate time frame: late May 2019 through mid-August 2019. | Type of Employment: [x]  NonexemptCompensation: Approximately $15/hr |
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| Company Overview |
| The Capital Chart Room LTD®, a highly respected and growing firm, helps substantial families achieve wealth-related results with unprecedented momentum and efficiency.Our trademarked process, The Results Accelerator System™ (TRAS), provides a unique planning experience over a lifetime relationship with ultra-successful business owner clients. Our team members possess integrity, enthusiasm, professionalism and a dedication to serving our clients that is second to none. |
| Internship Description |
| * The Capital Chart Room, LTD® will provide a work experience that focuses on the primary financial planning topics contained in the CFP Board’s Education Requirement, including, but not limited to:
	+ Financial Plan Design
	+ Investment Management and Reporting
	+ Participation in Client Meetings
	+ Other areas, including risk management, tax planning, and estate planning
* Additional projects will be assigned to provide the student with a general understanding of our firm and the financial planning industry.
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| Intern education requirements |
| * Primary consideration will be given to those students enrolled in a degree program that meets qualifications for the CFP® Board’s education requirements for the attainment of the CFP® designation.
* Additional considerations will be made for interns enrolled in closely affiliated degree plans such as finance, accounting, risk management, etc.
* The preferred intern will have completed at least four semesters of coursework.
* Student should exhibit exemplary achievement and a track record for managing multiple commitments.
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| Intern Profile |
| * Integrity of the highest standard
* Knowledge in the general areas of Financial Planning
* Effective interpersonal skills in communicating with team, advisors, and clients
* Excellent team work, organizational, and follow through skills
* Strong commitment to client satisfaction
* Professional presence, sound judgment, discretion and confidentiality
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