

Financial Planning Summer Rotational Internship

At Centennial Advisors, we believe our clients' best is yet to come. We also believe that applies to our team of colleagues as well. Are you currently minoring or majoring in the financial planning program and interested in a summer internship with a wealth management firm? If you are looking for a dynamic growing company, we have the opportunity for you! Our successful financial planning firm is seeking interns for our rotational summer program working in Austin, TX and Georgetown, TX.

Position: Full Time Summer Rotational Financial Planning Internship / 40 hours/week

Minimum Requirements:

- Currently in your junior or senior year with an expected graduation date of Winter 2019 or Spring 2020
- Major or minoring in the financial planning program
- GPA of 3.5 or higher in core classes related to your major
- Available to work 6-8 evenings a month for retirement planning seminars or presentations
- Proficiency in Microsoft Office with advanced Excel skills
- Excellent verbal and written communication skills
- Polished interpersonal and presentation competencies

Responsibilities:

- Provide support to the financial planning team for client meeting preparation
- Assist with financial planning / case design for portfolio analysis
- Enter and maintain client information in the firm's CRM system
- Attend and contribute to team and client meetings
- Assist with prospect focused retirement planning seminars or presentations
- Assist with special projects as needed

To apply: Please email your resume to applications@cenadvisors.com.