Wealth Planning Summer Associate

About Us:

Cypress Point is a leading registered investment advisory firm based in Dallas, TX. We are passionate about delivering exceptional advice, planning, and service and we use our clients' success to measure our own. We provide investment management, comprehensive wealth planning, and family office services to help our clients reach their life goals and objectives.

Job Description:

Cypress Point Wealth Management is currently looking for a Summer Associate to join our fee-only Wealth Planning team for the summer of 2019. The individual selected for this opportunity must be dedicated to client service and have the highest ethical and professional standards of excellence. Our Summer Associate will also have the opportunity to work alongside on-staff CERTIFIED FINANCIAL PLANNER™ professionals, Certified Public Accountants, and a Chartered Financial Analyst.

Job Functions:

Our internship position offers experience in the following areas:

I. Wealth Planning;

- Actively participate and contribute to the Wealth Planning team's projects
- Assist with the preparation of comprehensive wealth plans including cash flow management, risk management, investment management, tax planning, financial independence planning and estate planning
- Learn how to navigate and use the primary client software (MoneyGuidePro, Salesforce, Morningstar, Schwab Institutional, Fidelity Institutional, TD Ameritrade VEO, Tamarac, and QuickBooks Enterprise and Online)
- Assist with preparation of client follow-up notes and materials
- Participate in client meetings
- Research a specified project provided by the leadership team with the opportunity to present your work

II. Tax Planning;

- Assist with tax projections and tax research as it related to client situations
- Research and update cost basis information

III. Client Care;

- Preparation of client paperwork at Schwab, Fidelity, and TD Ameritrade
- Data entry and database clean-up
- Occasional administrative responsibilities (answering phones, scanning, filing, folder clean-up, etc.)
- Coordinate client servicing tasks with the Client Care team

Qualifications:

- Strong communication and interpersonal skills
- Entrepreneurial minded and self-sufficient
- Ability to work and thrive in a collaborative professional team environment
- Currently pursuing a Bachelor's Degree in Personal Financial Planning
- Available at least 40 hours per week for 8 weeks
- Strong analytical skills and the ability to work with professionals across all levels of the organization
- Submission of a resume and cover letter to Jennifer Gerstner (jgerstner@cypress-wealth.com) and Brandon Ratzlaff (bratzlaff@cypress-wealth.com)