



Dovetail Wealth/ Texas Tech Personal Financial Planning

DOVETAIL WEALTH

Dovetail Wealth Management is a SEC Registered Investment Advisory (RIA) located in Taylor, TX. The office is seeking a summer intern. Taylor is located approximately 35 minutes northeast of downtown Austin.

The office staff is composed of two advisors that are responsible for business development, two onsite support staff, and two part time remote support staff. The principal is a CFPTM and is active in business development, wealth management and managing client relationships. The office has over \$150M+ in assets under management in advisory and brokerage relationships. The revenue is primarily derived from advisory services. The office clears through LPL Financial.

The primary tools used for financial planning and client management are MoneyGuide, Albridge, Morningstar Workstation and Redtail.

YOU

The ideal candidate should desire to work in an entrepreneurial environment and have an interest in business development. As such there will be opportunities that focus on existing client profitability, client segmentation, and delivery of services. Additionally, the intern will develop and review client financial plans and participate in client meetings.

Candidate must have strong verbal and written skills. Additionally candidate should be able to interact well with the team.

Due to confidential nature of required job duties a background check will be required prior to employment.

Ideal start date would be middle of May to first part of June.

Compensation will be provided and be based on candidate's skill set.