

# Financial Planning Intern

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Available: Summer 2019

Deadline to Apply: January 5<sup>th</sup>

Final Decision: January 25<sup>th</sup>

## ***Position Description***

The Nelson Team at Focus Financial is offering a paid internship for our wealth management team in Minneapolis, MN. We designed our internship program to be the ideal opportunity for those seeking a financial planning career. We're focused on giving candidates a well rounded experience in the art and science of the business of financial advice.

We are especially interested in you if you like the idea of working on cutting edge financial planning techniques, developing outside-of-the-box solutions to financial issues, continually growing your financial planning knowledge, and appreciate the opportunity to make a meaningful impact to clients' lives as a result of your work and ideas.

## ***Key Highlights & Job Duties***

- Get exposure to client meetings and afterward facilitate action items to client and other staff
- Participate in developing recommendations, agendas, and analysis in preparation for client meetings
- Maintain and organize client details in several software systems
- Support the process of developing financial plans, developing asset allocations, executing trades, and managing account reporting
- Participate in discussion and share ideas for delivering more value to clients, improving the client experience, and increasing team efficiency
- Have a material impact on the clients we serve by helping us care for our clients and deliver an elite client experience that is always improving
- Side project allowance: Up to 1 day per week interns can spend on any side project they want for the team

## ***Desired Qualifications and Characteristics***

- Working toward a degree in Financial Planning or a related field and/or the CFP® certification
- Possesses a "no task is beneath me attitude"
- Superior problem solving skills
- Intellectually curious and a quick learner
- Detail-oriented, but capable of swiftly completing projects with adequate assumptions
- Excellent command of the English language with a professional communication style, both verbal and written

## ***The Perks***

- Compensation set higher than most peers
- Opportunity for continued paid work after summer is over
- Personal mentorship by team advisors
- Plans for some employer provided snacks & food in upcoming new office
- Possible job offer after graduation

## ***Apply***

Send cover letter and resume via email to [sscheuermann@focusfinancial.com](mailto:sscheuermann@focusfinancial.com)



**Jonathan Dennison** | FINANCIAL ADVISOR

1000 Shelard Parkway, Suite 300, Minneapolis, MN 55426

952-225-0340 direct | 952-525-8538 fax | 952-591-9770 main

[www.nelson-focusfinancial.com](http://www.nelson-focusfinancial.com)

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