Financial Planning Intern

Job Location(s)US-TX-Dallas

Dept.

Southwest Region Counseling

Category

Internship

Job ID

2021-SWR-Intern

Overview

The *Financial Planning Intern i*s for students who have an interest in one or more of Ayco's financial counseling businesses:

• **Coaching -** Management and navigation of personal finances, life events and company benefits delivered through a digital platform with one-on-one guidance from a coach.
• **Planning** - Advice, investment services and guided implementation of a personal financial plan for those with increasingly complex finances delivered through a dedicated advisor and digital platform.
• **Counseling -** Proactive financial counseling, full-service implementation, including tax preparation and investments, to address complexities of executives, entrepreneurs and high net worth individuals.
• **Family Office** - Sophisticated solutions to streamline the intricate financial lives of ultra-high net worth families, through comprehensive coordination, advanced risk management, investment services and legacy preservation strategies.

Summer and year-round internship opportunities are available. Students must be available to work 16-20 hours per week during the semester and/or 40 hours during breaks/summers.

Applications are now open and interviews will take place on a rolling basis. We do ask that you only apply to one position at a time to ensure the best candidate experience. Our recruiters will review your application and may submit you to other positions based on your skillset.

Ayco is an industry pioneer and preeminent leader of company-sponsored financial planning services. We believe companies best serve their stakeholders and the greater economy when their employees' financial lives are clear, understood and in their own control. For nearly 50 years, we've aspired to deliver a more productive and engaged workforce to our clients by providing their employees a path to financial well-being through holistic and personalized services tailored for each stage of the career cycle—from entry-level to C-suite.

Responsibilities

• Assist counseling teams with various financial counseling projects, as well as some administrative tasks
• Work with various financial areas such as income taxes, employee benefits, estate/wealth transfer planning and insurance

• Assist with answering customer service phone and/or proactive outreach calls to clients
• Participate in various training and perform research and special projects as assigned

Qualifications

• Must be in pursuit of a degree equivalent to a Bachelor’s or above graduating between December 2021 – May 2024

• Working knowledge of certain Microsoft products, including, Word, Excel, Outlook, PowerPoint, and Windows
• Self-motivated
• Good analytical skills
• Detail-oriented
• Ability to multi-task
• Highly organized
• Superior written and verbal communication skills