We are seeking a Financial Planning intern for our wealth management company in Houston, Texas. We are very interested in you if you are a student working towards a CFP® certification who wants to learn from a team of established professionals and begin working with clients immediately. Candidates that fit into our firm and culture are extroverted, will believe in a holistic planning focus for high net worth clients, a tactical asset allocation management philosophy, and a commitment to a fulfilling work/life balance.

**Position Overview**
This is a professional position that will support Lance Elrod, CFP® who is managing existing and new client relationships. You will be expected to assist in preparing financial projections using eMoney financial planning software and Excel spreadsheets, and various projects including portfolio reviews. Thorough computer skills are essential, with a strong understanding of the Microsoft suite of products. A working knowledge of portfolio allocation and investment management is expected. The owners of the firm are available to provide mentoring and big picture direction, but you must have the ability to utilize critical thinking skills, work independently, and anticipate firm needs and client questions.

**Initial Key Areas of Responsibility:**
- Prepare financial plans and retirement projections
- Involvement in all aspects of pre-client meeting activities such as preparation of meeting agendas, client paperwork, Investment Policy Statements, asset allocations as well as post-client meeting tasks such as develop meeting notes, perform financial situation analyses, and coordinate planning implementation with outside professionals if necessary
- Regularly monitor clients’ financial situations with attention to detail and accuracy
- Interact with clients over the phone and in-person professionally and respectfully
- Work with the custodial platform AssetMark Trust, SEI Trust, Riskalyze, Envestnet, Microsoft Office-based CRM, Redtail, eMoney and Morningstar software

**Key Qualifications:**
- Working toward B.A. or B.S. degree from accredited four year university
- Strong financial and analytical skills
- Strong verbal and written communication skills
- Strong persuasive and interpersonal skills
- Ability to identify, meet and follow through with client needs and requirements
- Must be a self-starter, problem solver and a goal-oriented team player with a ‘no job is beneath me’ attitude
- Able to work independently
- Organized, with a strong attention to detail
- Able to perform multiple tasks efficiently
- Show curiosity and confidence when dealing with clients and principals

Lampe & Son Wealth Management
11110 N. Eldridge Pkwy. Houston, TX 77065
• Above average knowledge of Microsoft Excel and Word

Benefits:
• Competitive hourly rate with performance based pay program and career track available for the future.
• Professional development
• Mentorship and Learning Opportunities
• Casual, low stress work environment

Please send your resume to Adam Lampe at adam@lampeadvisors.com for consideration.