Internship Posting (Remote or in house)

Who should apply: Junior or Senior in Financial Planning Program
Compensation: $10/hour
Deadline to apply: Open
Supervisor: Tammy Prouty

General Overview of Company and Job

Sound Financial Planning, Inc. is a small boutique financial planning firm located 1 hour North of Seattle and South of the international city of Vancouver, Canada. We have 2 CFP’s and a Client Service Specialist. We are independent and fee-only with a lifestyle practice.

College interns usually have no experience and usually work under the supervision of a senior and/or junior advisor. They primarily perform back office, support functions. These functions might include the following: gathering data from financial planning clients, attending initial client meetings, input of client data into related software packages, updating client financial plans, and supporting the firm advisor(s) in all aspects of delivering high quality client service.

Primary Learning Opportunities:

- **Hospitality** -- Communicate and service clients via in writing, or by telephone or e-mail.
- **Account Management** – Complete paperwork for client investment accounts. Facilitate deposits and withdrawals.
- **Participate in client meetings** – Prepare for, attend, and document client meetings.
- **Document management** – Organize, scan, and file client and corporate documents.
- **Trading support** – Prepare and submit Trades and Trade Records.
- **Compliance assistance** – Review trading and client accounts.
- **Financial Planning assistance** – Input financial planning data into software and make recommendations. Prepare reports.
- **Investment Management assistance** – Input information into Asset Allocation software and print reports. Maintain investment models and facilitate quarterly performance reports for clients.

Special Projects and research -- Analyzing information and evaluating results to choose the best solution and solve problems.

Share ideas and collaborate with firm owners – Offer suggestions for improvement in any area of the firm. Share ideas to improve client experience.

Marketing – Send out newsletters to clients and other professionals and post them to the firm blog. Create or update forms for prospective clients. Assist in implementing Social Media marketing strategies.

Technology – Assist in review and implementation of existing and new technology solutions.

Abilities Required:

Technical Knowledge – Student should have basic financial planning classes completed. Student should also have some financial planning software experience. We prefer the third year completed.

Interpersonal/Communication skills - The ability to relate well to different types of people including clients and staff within the firm; ability to express self verbally. The ability to listen to and understand information and ideas presented. Emotional intelligence; the ability to control your emotions and focus on positivity.

Organizational skills - The ability to use time and resources efficiently to accomplish targeted firm objectives. The ability to prioritize and keep work space organized.

Management Skills - The ability to manage ones self and take initiative and responsibility. The ability to lead and empower clients and the firm team.

How to Apply:
To apply, submit a cover letter summarizing why you are interested in the position and a resume to info@soundfinancialplanning.net

SoundFinancialPlanning.net