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www.JLFwealth.com
Registered Investment Advisor

Wealth Advisor Intern

Are you looking for a challenging and rewarding position with long-term growth potential? Do you want to make a positive impact in people's lives? Are you curious about financial planning?

Position Description
The Associate Wealth Advisor Intern is a position with substantial room to grow as a member of our team led by a female entrepreneur. As a paid intern, you will work in our **Marin County** office on all aspects of wealth management, including: solving client requests, data gathering and analysis, financial planning and portfolio reviews, meeting preparation, drafting trades, researching investments, client communication, client account maintenance, and implementation of recommendations. Your projects will increase in complexity as you demonstrate your competence and ability. The Associate Wealth Advisor Intern will also assist in writing and editing our newsletter, website, and social media content. All client relationships are handled on a team basis and the Associate Wealth Advisor Intern is a key member of the team.

At the end of this internship, there will likely be an opportunity to move into a permanent position.

Desired Skills and Qualifications
Skills:
• Analytical skills to prepare and analyze client financial statements, plans, and investments
• Working knowledge of Microsoft Office Suite (Word, Excel, and PowerPoint) using a Windows-based computer
• Strong communication skills with the ability to interact with our Wealth Advisors and high net worth clients both verbally and in writing
• The ability to manage time effectively and prioritize projects to ensure on-time completion
• A highly collegial and collaborative work style; able to work well with all members of the team and collaborate in all aspects of serving our clients
• Strong work ethic and eagerness to "roll up your sleeves" to get things accomplished for the client and the team
• A high level of professionalism

Qualifications:
• An acute attention to detail and accuracy
• Excellent written and verbal communication skills
• Uncompromising ethical standards
• Desire and ability to work successfully in a small company environment
• Compassion and an approachable, friendly personality
• A client-comes-first attitude

Compensation

An hourly wage will be determined based on experience and qualifications. Casual dress code, weekly staff lunch and the ability to learn about your own personal financial situation are added benefits.

Location
Larkspur, California

How to Apply
Please visit the Job Opportunities page of our website at www.JLFwealth.com to apply for this position. Include a cover letter telling us why you are interested in this position, and your resume. We prefer attachments to be uploaded in PDF format. No phone calls, please.

We look forward to hearing from you!