LINSCOMB WILLIAMS

Job Title: Financial Planning Intern
Reports To: Sr. Financial Planner or Financial Planner
FLSA Status: Internship
Department: FINPLN
Date Prepared: 2018-05-12

Job Description
Financial planning interns will be given the opportunity to work closely with our financial planners and wealth advisors, as well as other members of the firm to gain experience around all areas of the financial planning process. They will assist the planning team with the development of financial plans and proposals for existing clients as well as prospective clients of the firm. They will participate in financial planning team meetings, as well as other firm level committee meetings where appropriate. Financial planning interns will have opportunities to participate in other areas of the business, as part of their training, including time spent with the investment, trading, operations and client service teams.

Responsibilities
- Help financial planners create cash flow models and related financial analyses for clients and prospective clients of the firm.
- Participate in brainstorm meetings to discuss client situations, planning opportunities and investment recommendations.
- Assist planners with the development of recommendations and action plans around all areas of the financial planning process for clients and prospective clients, including retirement planning, education funding, investment policy, estate planning, insurance and asset protection, income tax planning, employee benefits, concentrated wealth, charitable strategies and other items that impact a client's or prospective client's financial goals.
- Possibly join client meetings to observe the client engagement process in more detail.
- Work with the financial planning team and other members of the firm to help develop and document firm best practices.

Wealth Management Committee
- Help research ideas and prepare materials for presentation and discussion at Wealth Management Committee meetings, which include all senior wealth advisor and other key members of the firm.

Requirements
- Proactive and strong work ethic

- Proficient with Microsoft Word and Excel, CRM Database, Document Management software, eMoney or other Financial Planning software a plus
- Strong writing skills
- Ability to multi-task, prioritize and meet deadlines
- Professional appearance and demeanor
- Ability to work well in a team environment

Education/Experience

- Pursuit of a Bachelor's degree (B.A. or B.S.) from four-year college or university, with a degree in Financial Planning, Finance, Accounting or other business related degree

Interested applicants can submit a resume and cover letter to Brooke Jackson (bjackson@linscomb-williams.com)