Job Description
Operations Intern
May 1, 2017

Opportunity Overview

The Operations Intern will gain exposure to the day-to-day operations of a fee-only, as-needed financial planning firm. He or she will learn and participate in delivering services in the following areas:

- Client service including answering phones, appointment scheduling, confirmations, responding to client emails, follow-ups.
- Helping confirm data and workflows are accurately transitioned from redtail to salesforce to ensure smooth client service.
- Other projects as needed.

Skills & Attitudes Required

- Strong computer skills including Word, Excel, and Outlook.
- Friendly, confident, sincere approach to interpersonal relationships.
- Solid written and verbal communication skills.
- Accuracy, speed, and attention to detail for record keeping and working with client data.
- Highest level of ethical responsibility and respect for client privacy.
- Quick learning skills for multiple technology and financial tools.
- Desire and ability to work independently and as part of a team.
- Long term interest in a career on the operations or financial planning team of a financial planning firm.

About Keener Financial Planning

Keener Financial Planning is a fee-only financial planning and registered investment advisory firm with a primary office in Keller, TX and a satellite office in Dallas. As members of the Garrett Planning Network and NAPFA, our mission is to provide objective, expert financial advice tailored to each client’s unique situation. Services range from a la carte financial advice on an hourly or flat-fee basis to comprehensive financial planning and investment management.

We have a fun, supportive work environment. But it’s not easy. We work really hard to deliver an extremely high quality, consistent financial planning experience for each client. We served about
260 client households last year with a team of 6 people so we have multiple deadlines and deliverables every single week.

We are a growing firm. We want to continue providing highly personalized service while scaling our business model with efficient processes, smart use of technology, and extraordinary people. We view this internship as a way for us to get to know each other for possible future opportunities, all while you gain valuable, hands-on experience and help us out with some important work.

**Internship Details**

- Part-time, 1:30 – 5:30 pm Mon – Fri at the Firm’s main office in Keller, TX
- $12 per hour
- Internship is for approximately 3 months in the summer of 2017, exact dates to be determined by the candidate and KFP.

**How to Apply**

Send your resume and a cover letter to info@keenerfinancial.com. Please use PDF or Microsoft Word format.