Available: Summer 2019
Recruiter: Laura Lithgow
Application Deadline: November 16th 2018
Final Decision to be made by December 15th 2018
See “Apply” section for application instructions

RTD Financial Advisors, Inc., is offering a paid Financial Planning summer internship in our Philadelphia office. RTD is a distinguished, nationally recognized, fee-only financial life planning firm. Recently, RTD was named as Financial Planning Magazine's 2016 "Top 150 RIA Leaders," Financial Times 2017 "300 Top Registered Investment Advisors" and Philadelphia Business Journal’s “Best Places to Work 2016.”

If you are working toward a degree in financial planning and/or a CFP® designation, and your career goal is to become a financial planner, we are interested in you. While having completed courses in financial planning courses is definitely a plus, the most important attribute is a strong desire to be an outstanding financial planner.

Over the summer you will have the opportunity to work with several financial planners and other members of the firm. This is a unique opportunity to learn from, and be a part of a progressive financial planning firm. Candidates that fit our firm’s culture prefer working on a team, believe in comprehensive financial planning with a focus on life planning, and have a commitment to the highest levels of ethics and client service. The position entails experiencing many different aspects of financial planning and having fun doing so.

Key Qualifications:

- Working toward a degree in Financial Planning or a related field and/or the CFP® certification
- Committed to the financial planning process
- Strong verbal and written communication skills
- Self-starter, problem solver and goal-oriented team player with ‘no job is beneath me’ attitude
- Organized, with a strong attention to detail
- Exudes professionalism and respect
- Demonstrate curiosity and confidence when interacting with financial planners
- Experience working with eMoney, Money Guide Pro, Junxure, and PortfolioCenter is a plus

Duties and Responsibilities:

- Participate as an active member of the firm, embracing RTD’s Financial Life Planning process
- Assist in preparation for client meetings
- Draft follow up letters, create emails and input actions from meetings into CRM software
- Participate in financial plan implementation
- Attend client meetings and 401k enrollment meetings, as the opportunities arise
- Prepare reports and analysis based on client service requests
- Interpret and input summarized tax information for each client into CRM software
- Assist in summarizing estate planning documents
- Serve as a member of RTD’s Plan Y Committee
- Attend RTD’s Financial Planning, Investment, and Retirement Committee meetings
- Assist various committees with specific projects
- Commit to continuing financial planning education
- Perform other duties as assigned

Apply:

- Applications must contain a cover letter, resume and completed “Employment Application” and should be submitted as one file in PDF format via email to careers@rtdfinancial.com