

Wealth Management Internship - Rockville, MD

JOB DESCRIPTION

Bronfman Rothschild is in search of a wealth management intern for our Rockville, MD office. As an intern, you will support Directors, Wealth Advisors, and Client Associates in the diverse aspects of client relationships and in various firm-wide initiatives. Wealth management interns report directly to an assigned member of the BELR team.

JOB RESPONSIBILITIES

- Actively service client accounts by processing necessary paperwork for accounts, track and monitor account/asset transfers, process transaction requests as directed. Create and execute rebalance reports, RMD (Required Minimum Distributions) calculations and distributions, tax loss harvesting coordination, etc.
- Assist with the development of client financial plans through utilization of financial planning software.
- Participate in portfolio construction projects with members of the BELR wealth management team.
- Develop positive relationships by handling administrative requests from team members on behalf of clients or otherwise. Handle client matters in a timely and efficient manner.
- Assist with the reconciliation and review of financial data.
- Conduct investment research for clients or firm-wide initiatives.
- Assist in the review and allocation of 529 college savings plans.
- Research client issues as directed and present data.

REQUIREMENTS

- Senior, rising senior, or recent college graduate
- Definitive interest in wealth management and client service
- Ability to manage and prioritize multiple projects effectively in a fast-paced, dynamic, and high performance work environment
- Excellent attention to detail
- Strong interpersonal and communication skills
- A dedication to teamwork and a hard-working attitude
- Capacity to think critically and devise creative solutions
- Proficiency in Microsoft Word, Excel, and PowerPoint

COMPENSATION

- Competitive hourly rate with the potential for full time employment upon completion of the internship.

Please submit a cover letter and resume to jobs@belr.com.

No phone calls, please.