

# Financial Planning Intern

## Financial Planning Intern

Sullivan, Bruyette, Speros & Blayney, LLC (SBSB) has a current opening for a full-time Financial Planning Intern to join our fee-only wealth advisory practice in McLean, VA for Summer 2019. This position works collaboratively on a client service team to provide financial planning, investment management, and tax services for our clients.

As an SBSB Financial Planning Intern you will be mentored by and work alongside our deeply experienced CERTIFIED FINANCIAL PLANNER™ professionals, Certified Public Accountants, and CFA® charterholders and will have the opportunity to address financial planning strategies and questions.

### Key Financial Planning Intern Responsibilities:

#### FINANCIAL PLANNING

- Assist with the preparation of comprehensive financial plans including cash flow management, risk management, investment planning, tax planning, retirement planning, and estate planning
- Learn how to navigate and use the primary client software and websites (eMoney Advisor, Salesforce, BNA, Tamarac, Schwab Institutional)

#### TAX

- Assist with tax projections and tax research as it relates to client situations
- Research and update cost basis information

#### CLIENT SERVICING

- Assist with the preparation of client follow-up letters and correspondence
- Participate in client meetings, as appropriate, with Client Advisors from across the firm
- Coordinate client servicing tasks with Operations Specialists

### Key Financial Planning Intern Requirements:

- Currently pursuing Bachelor's Degree. Preference given to Accounting, Finance, Economics, or Mathematics majors
- Enrollment in a CFP Board-registered program preferred
- Strong analytical skills and the ability to work with professionals across all levels of the organization

[click HERE to apply through our website](#)