



Join Our Team

Virtual Financial Scribe Internship





Virtual Financial Planning Scribe Internship

(Ideal for rising Sophomores and Juniors)

- Gain hands on real-world exposure – Take case notes in live client meetings and learn about the planner client relationship by working closely with one of our many CFP®s before, during, and after client meetings.
- Put academic learning in practice – See concepts from your financial planning classes being applied in a real-world setting.
- Work virtually – Attend Zoom meetings, so you can balance your academic focus and internship during the school year.
- Make money: \$15/hour
- Availability Expectation: 4-6 hours a week (more if your schedule allows)
 - We are hiring for the Fall 2024 semester, and your internship will continue throughout your school year. Having a Summer Internship does not exclude you from applying

Apply now, [Click here](#)

- The application will begin with completing a one-hour assessment to reveal skills and aptitude and creating a one-minute video describing why you would be a good candidate.



What our past interns say

"CrossPoint's scribe internship was vital in my development as a financial advisor. It provided valuable insight into the relational side of financial planning and allowed me to see the concepts we learned in class applied in the real world. For any student looking to better themselves not only technically, but also relationally, the scribe internship is one of the best opportunities available." – *Andrew Koblyski, Virginia Tech Class of 2020*

"CrossPoint's scribe internship was a unique experience that gave me a lot of insight into the client-advisor relationship. At most internships you spend most of your day doing prep work and back-office activities, but with this you are always in client meetings. I remotely called into client meetings, summarized important information, and had helpful post-meeting discussions with the lead advisor. This helped me hone my listening and observational skills and looked great on my resume. Because of the flexible schedule I was able to work during the semester which gave me more work experience than many of my peers." – *Richard Grant, Virginia Tech Class of 2020*

"Joining CrossPoint for the scribe internship helped me to gain valuable, real-world experience while I was still in school. By taking meeting notes, I developed a better understanding for how typical client meetings flow, what kind of things most clients focus on and care about, and how to better connect with clients. I also learned about various financial planning topics, which gave me a leg up in my classes, especially Case. Being able to sit in on meetings has helped me in the first few months of my career, as I am better prepared to provide input and make quality contributions in client meetings and provide better analysis outside of meetings." – *Ryan Jordan, Virginia Tech Class of 2021*

"The financial scribe internship has been the single most impactful educational experience I have had in college. It has allowed me to practice my communication skills and see how the things we are taught in the classroom are put into practice in the real world. The hours were very flexible and approachable and allowed me to easily schedule meetings around classes while getting to scribe for successful advisors." – *Devin McCombs, Virginia Tech Class of 2022*

"My experience as a scribe at CrossPoint made me so much more eager to become a financial planner. Not only did it solidify the technical knowledge I learned in the classroom, but I also got to witness how each financial planner uniquely interacts with their clients and how they structure their meetings. I recommend the scribe internship to any future financial planner looking for a rewarding experience and who wants to be a fly on the wall while advisors walk their clients through reaching their personal and financial goals." – *Caleigh McDonough, Virginia Tech Class of 2022*

"I thoroughly enjoyed the opportunity to spend time with CrossPoint. The fact that I was able to sit in actual client meetings was extremely enjoyable, as I was able to learn not only the basics of how these meetings operate, but also the management of client relationships and face-to-face interactions. From a learning perspective, I feel extremely lucky. Being as young as I am, I have yet to take any courses on financial planning or anything related to the field. From the start, everything I heard during meetings was foreign information and both Founders were always sure to spend time with me after the meeting answering any questions that I had." – *Thomas Kellogg, Virginia Tech Class of 2024*



7 Team Members

+ 6 Interns



5 CFP®s



300 Plans/yr

Hybrid Model

- Investments + (\$425 AUM)
- Insurance (LI, DI, LTC)

Virtual Financial Planning Firm

- Richmond
- Clifton
- Blacksburg
- Charlottesville
- Martinsburg



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