Summer Internship

Arrow Wealth Advisors is a small independent and fee-only registered investment advisory firm serving around one hundred families from our office located in north central San Antonio. We deliver methodical, in-depth, and evidence-based comprehensive financial planning to both individuals and families. We also provide wealth management guidance to a select group of analytical professionals who have completed our planning process and share in our desire to be goal focused and purpose driven as they continue to plan for life while protecting their future.

Job Summary

Summer interns will work closely with the Arrow Wealth team on projects that are designed to give students first-hand experience in the practical application of all facets of the Certified Financial Planner Board of Standards' body of knowledge. We are looking for individuals who are willing to bring ideas while also honoring the culture and processes of Arrow Wealth Advisors. A successful intern will be able to demonstrate assertiveness and ask difficult questions; personally commit to completing the work assigned to them on time and with high quality; be able to understand the intent of instructions/assignments and make objective/independent decisions; as well as watch for ways in which processes/procedures/systems can be improved to help the business run more efficiently.

Duties and Responsibilities

Primary Duties include:

- Attend all client and prospect meetings, take notes, and coordinate implementation of actionable items.
- Work alongside the advisor, leveraging technology to assist in setting up trades for wealth management clients
- Analyze investment options inside client retirement plans and assist with asset allocation and investment selection decisions
- Audit client files to confirm that agreements, investment policy statements, and beneficiary designations are current
- Distill complex financial data down to client friendly visual aids for use in client meetings
- Assist advisor with financial planning, wealth management, and tax-related research projects
- Work with the director of operations to document inefficiencies, improve upon existing processes, and continually elevate the client experience
- Work with advisor and director of operations to develop content for newsletter and social media platforms

Additional tasks may include:

- Communicate with existing clients to gather/update information for annual plan updates
- Assist director of operations with onboarding new wealth management clients
- Work with director of operations to coordinate annual compliance reviews
- Assist wealth management clients with establishing and optimizing their online portal
- Update client information in CRM system
- Assist director of operations with billing and reporting
- General administrative duties as needed

Qualifications

- Enrolled in Personal Financial Planning degree program
- Available May 24, 2021 – July 30, 2021 to work in San Antonio, TX
- Comfortable working closely with both a team and on their own independently
- Ability to turn “big picture” ideas into results with minimal instruction
- Detail oriented
- Possess creative problem solving and critical thinking skills
- Proficient in basic MS Office applications (Outlook, Excel, Word)
- Strong written and verbal communication skills

Compensation & Benefits

- Arrow offers $16 an hour for 10-week (40 hours per week) internship
- Flexible hours with limited ability to work remotely may be available
- Intern will have their own office space

If interested, please email resumes to: info@arrowwealthadvisors.com