



DEW WEALTH MANAGEMENT

THE ENTREPRENEUR'S VIRTUAL FAMILY OFFICE®

www.dewwealth.com

8888 E. Raintree Dr, Scottsdale, AZ 85260

Who we are:

Dew Wealth is an independent RIA, exclusively serving high performing entrepreneurs and business owners who operate in the top tax bracket. We advise on the traditional pieces of financial planning (investments, insurance, tax planning, estate, charitable, etc.) as well as some non-traditional pieces (corporate finance, M&A, private banking, real estate, and much more). **Dew Wealth needs your help!** We have too many entrepreneurs/business owners with complicated financial lives and not enough bright young advisors to help them navigate it.

What you will do:

- Assist on a **wide** variety of current client projects with associate and lead advisors
- Attend client meetings, take notes, and develop action steps...then act on them
- Review, critique and improve new client's financial plans in combination with a lead advisor
- Research planning strategies and find the tactical steps to implement them

This opportunity is for you if:

- You want to learn from Senior Advisors who possess advanced planning knowledge
- You want to work alongside the best of the best niche professionals and specialists
- You are relentless and will stop at nothing to drive results
- You will be fulfilled by realizing the impact you can make serving elite entrepreneurs so that they can continue to grow their amazing businesses

This opportunity is not for you if:

- You want to spend considerable time researching "the market" and making investment allocation changes (investment management is <10% of this job)
- You do not have high follow through, good project management skills and a propensity to take action
- You are not curious and don't have a desire to constantly learn and improve

Qualifications:

- GPA: 3.5 or higher

To be successful, the ideal candidate will have:

- A desire to overdeliver
- Enthusiasm
- High integrity
- A need for a fast paced environment
- Impeccable follow through and high attention to detail
- The intent to pursue and earn the CFP® mark shortly after graduation

Compensation:

- \$20/hour and reimbursement for relocation will be considered
- Upon a successful internship and with the intent to pursue the CFP®, the candidate could be asked to return as a Paraplanner

If this is you, please email your resume and a brief cover letter to Clay@DewWealth.com