Financial Planning Internship

About the Firm
MY Wealth Planners® is the only fee-only RIA and financial planning firm in Longmont, CO, and serves clients along the northern front range and around the United States. It is a small two-planner firm that specializes in comprehensive financial planning and investment management for household clients.

Position Overview
This is an internship that will directly support the firm's lead and associate financial planner in managing existing and new client relationships. You will be expected to assist in various projects, including financial plan development and portfolio reviews. Thorough computer skills are essential, with a particularly strong understanding of Excel. An introductory knowledge of the financial planning process as defined by the CFP® Board, portfolio allocation, and investment management is expected. The internship runs from June 1st to July 28th, and the schedule is expected to average 35-40 hours per week.

Areas of Learning
- Assist the planners in preparing for and conducting client meetings
- Involvement in all aspects of pre-client meeting activities, such as reviewing client data and financials. You will also be responsible for post-meeting activities, such as developing meeting summaries and performing financial situation analyses
- Work with TD Ameritrade Institutional, eMoney, Fi360, Advyzon, Holistiplan, iRebal
- Interact with clients over the phone, zoom, and in-person
- Reading seminal financial planning and investment books and applied assignments

Work Environment
Work is performed in-person at our office in Longmont, CO, or remotely, as determined on a week-by-week basis. In-person work is only performed when required for client meetings or training.

Qualifications
- In a B.A. or B.S. collegiate track as part of a CFP® Board Registered PFP Program
- Must be a self-starter, problem-solver, and goal-oriented with a "no job is beneath me" attitude
- Ability to work independently and keep supervisors aware of progress and challenges
- Completed COVID-19 Vaccination is a requirement, and proof of vaccination is required

Compensation
- $2,600/Month Salary
- Qualifies for CFP® Board Apprenticeship two-year work experience requirement

Application Process
We welcome applicants of all backgrounds, including nationality, religion, sexual orientation and identity, race, and any other form of uniqueness that makes you uniquely you. Applications can be submitted between March 3rd and March 10th via Handshake. Candidates who submit a resume, cover letter showing genuine interest in the firm, and a transcript with the appropriate coursework (finance, financial planning, accounting, or business administration), and proof of COVID-19 vaccination, will receive an invitation to interview between March 13th and March 16th via Zoom with the firm's associate financial planner. Those recommended by the associate to the lead planner will be invited to interview in person or zoom meeting between March 20th and March 22nd. Final selection of an intern will be made on March 24th. Applications must be submitted via handshake. Directly contacting the firm's principal or staff to apply is not accepted and is actively discouraged.