Financial Planning Summer Associate

About Us:

Cypress Point is a leading registered investment advisory firm based in Dallas, TX. We are passionate about delivering exceptional advice, planning, and service and we use our clients' success to measure our own. We provide investment management, comprehensive financial planning, and family office services to help our clients reach their life goals and objectives.

Job Description:

Cypress Point Wealth Management is currently looking for a Summer Associate to join our fee-only Financial Planning team for the summer of 2020. The individual(s) selected for this opportunity must be dedicated to client service and have the highest ethical and professional standards of excellence. Our Summer Associate will have the opportunity to work alongside CERTIFIED FINANCIAL PLANNER™ professionals, Certified Public Accountants, a Chartered Financial Analyst, and Texas Tech PFP alumni.

Job Functions:

Our internship position offers experience in the following areas:

I. **Financial Planning;**
- Actively participate and contribute to the Financial Planning team's projects
- Assist with the preparation of comprehensive financial plans including cash flow management, risk management, investment management, tax planning, financial independence planning and estate planning
- Learn how to navigate and use the primary client software (MoneyGuidePro, Wealthbox, Morningstar, Schwab Institutional, Fidelity Institutional, TD Ameritrade VEO, Tamarac, and QuickBooks Enterprise and Online)
- Participate in client meetings
- Assist with preparation of client follow-up notes and materials
- Research a financial planning topic of personal interest with the opportunity to present your work to members of the firm

II. **Tax Planning;**
- Assist with tax projections and tax research as it related to client situations
- Research and update cost basis information

III. Client Care;

- Preparation of client paperwork at Schwab, Fidelity, and TD Ameritrade
- Data entry and database clean-up
- Occasional administrative responsibilities (scanning, filing, folder clean-up, etc.)
- Coordinate client servicing tasks with the Client Care team

Qualifications:

- Strong communication and interpersonal skills
- Entrepreneurial minded and self-sufficient
- Ability to work and thrive in a collaborative professional team environment
- Currently pursuing a degree in Personal Financial Planning
- Available at least 40 hours per week for 8 weeks
- Strong analytical skills and the ability to work with professionals across all levels of the organization

If interested in an opportunity with Cypress Point Wealth Management, please submit a resume <u>and</u> cover letter to Jennifer Cook (jcook@cypress-wealth.com) and Brandon Ratzlaff (bratzlaff@cypress-wealth.com).