Financial Planning Internship – Job Description

Job Summary:

The Financial Planning Intern works closely with the team of Financial Advisors in the preparation and follow-up on client meetings, entry of client-related information and financial data into planning software, and various project related activities.

Job Responsibilities:

- Comply with all policies and procedures of the firm
- Entry of client information into planning software (primarily eMoney)
- Manage follow-up tasks for client meetings
- Participate in firm projects that will be determined at the time of the internship but will encompass firm operations, business development, financial planning, and investment management
- Attend and take notes during client meetings

Job Requirements:

Education:

- Preferably enrolled in a CFP Board Registered Certificate Program
- Enrollment as a Junior in college minimum

Other:

- Heart to serve people
- Attention to detail, excellent organization and time management skills, proven drive to consistently follow-through
- Ability to listen well and communicate articulately in a professional manner: written, telephone and in-person
- Able to manage multiple priorities, handle frequent interruptions, prioritize and triage efficiently and effectively resolve conflict
- Process driven and results-oriented, able to work independently while embracing collaboration
- Creative problem solver, ability to anticipate need and actively participate in a continuous improvement culture
- Especially handy in a Windows/PC work environment, specifically MS Word, Excel and internet apps

If interested, please send a copy of your resume and cover letter to garrett@wisdomindex.com.