Financial Synergies Wealth Advisors: ***Financial Planning Intern (FPI)***

Summary of Position

The position of Financial Planning Intern (FPI) is an operational & client facing role that will be focused on serving existing clients and assisting Financial Advisors in financial plan creation, client paperwork, note taking, and various other tasks. The FPI will assist Financial Advisors in client meetings and will work closely with the Director of Operations to coordinate client paperwork and assist with back office tasks. This is a two-month paid summer internship (from June 1st through July 31st) that will also be verifiable for course credit if needed.

Our goal for the Financial Planning Intern is to get exposure to the various departments and roles within an independent wealth management firm. We hope that by the end of the internship, we will have a mutual understanding as to whether the FPI is a good match and if this position is a good fit for their career goals and objectives.

About Financial Synergies Wealth Advisors, Inc.

Financial Synergies Wealth Advisors is a fee-only Financial Advisor located in Houston, Texas. For more than thirty years we've been serving the financial needs of individuals, families, and businesses from around the world. Our clients become part of our extended family, and over the past three decades we've developed multi-generational relationships with many of them.

Our primary goal is to simplify our client's financial lives. Our Certified Financial Planner™ professionals and advisors combine investment management and holistic financial planning to provide total wealth management for our clients.

Duties and Responsibilities

Client Service

- ☐ Your primary objective is to observe, listen, and learn from the financial advisors.
- ☐ Running financial planning & performance reporting software.
- ☐ Taking detailed meeting notes.
- ☐ Preparing necessary paperwork before the client meetings.
- ☐ Following up with the client, as needed.

eMoney Advisor (Wealth-360)

- ☐ Completing all eMoney online training sessions (The Planner eMoney degree program).
- ☐ Creating and maintaining financial plans in eMoney.
- ☐ Coordinating the onboarding of clients into the eMoney software.
- ☐ Assisting in eMoney planning presentations.

Tamarac Reporting

- ☐ Completing applicable sessions of Tamarac Advisor University online.
- ☐ Creating various investment performance reports for client update meetings and quarterly statements.

Schwab Institutional & Fidelity WealthScape

- ☐ Completing applicable sessions of Schwab Advisor University / Fidelity WealthScape training.
- ☐ Developing a familiarity with Schwab/Fidelity paperwork & online processes.
  - Account opening paperwork (physical & eSignature packets).
  - Money movement paperwork (wires, checks, journals, etc.).

Tamarac CRM

- ☐ Creating records in CRM such as Leads, Accounts, Contacts and Activities.
- ☐ Completing & assigning action items and tasks.
- ☐ Logging phone call and meeting notes.
- ☐ Running dialogs and workflows.
- ☐ Taking on other data management projects, as needed.

Additional Considerations

Office Hours

- ☐ 8:00 AM - 5:00 PM (Monday - Friday)
- ☐ Daily Lunch Break (1 hour)

Special Project

- ☐ You will have a chance to sum up your experience with a special project that you will work on throughout the internship with the other intern.
- ☐ Present project findings as a team to the Leadership Team upon completion.

Interested candidates are to send their resumes Attn: Marie Villard at marie@finsyn.com or call 713-623-6600.