



Summer Internship

Castleview Wealth Advisors is one of the leading wealth management firms in the region and has become a career destination. Our continued growth has created an opportunity to continue an internship program this summer. Undergraduate and/or graduate students who are interested in financial services are invited to apply.

Clients of Castleview receive conflict-free advice from qualified and caring advisors that is aligned with clients' goals and needs. We believe that aligning our values alongside those of our clients is essential for achieving clients' financial and life objectives.

Our core purpose is to build happier and more prosperous lives. We believe a healthy work/life balance is essential – happy employees provide the best possible service to our clients. Our core values, career-pathing, and engaging work environment create a unique culture where talented people want to work.

Job Summary

In addition to providing students a valuable learning experience for students aspiring to be financial advisors, Castleview is also able to evaluate interns as potential candidates for full time positions after graduation. We are looking for an individual who works well in a team environment and can provide superior client service.

Duties and Responsibilities

We are looking for an individual with a great attitude, works well in a team environment, and can handle a variety of projects.

Potential projects include:

- Manage client meeting preparation and follow-up
- Gain a fundamental understanding of our investment philosophy and perform investment related projects
- Assist Senior Advisors with wealth management projects
- Sit-in on client account review meetings
- Assist with client related projects that involve implementing technology
- Utilize various financial planning tools and resources

Core Values

We will hire the person who best embodies and embraces the Castlevue core values:

- *Lifelong Learning*
- *Servant Attitude*
- *Fun!*
- *Pursue Excellence*
- *Team-Minded*
- *Integrity*

Qualifications

- Undergraduate or graduate student
- Available in June 2021 through August 2021
- Organized and detail oriented
- Friendly and service-oriented
- Superb communication skills – written and oral
- Proficient with computers and software packages, particularly Microsoft Word, Excel, PowerPoint, and Outlook

Salary and Benefits

- Offering \$16 an hour for approximately 8 – 10 weeks of work at 30-35 hours/week.

How to Apply

Interested applicants should send their resumes with a cover letter to Drew Garner, drew@castlevueadvisors.com. We will contact you if we believe your qualifications meet our needs. Thank you!

Castlevue Wealth Advisors is an Equal Opportunity Employer