



INTERN

OVERVIEW

The Intern position is a support role for the firm's Senior Advisors. Astoria Strategic Wealth seeks to mentor Associate team members to ultimately become the future leadership team across the functional areas of Investment Management, Financial Planning, Business Development and Operations. The ideal candidate will have experience in the financial services sector as well as a strong technical aptitude. This position requires a person who is committed to being part of a team that delivers a comprehensive client solution and assisting with the daily functions of a multi-priority work scope. A qualified applicant will natively love to learn, possess a positive, willing attitude, be reliable, conscientious, organized, goal oriented, and able to work well in a self-directed as well as collaborative environment.

QUALITIES/ATTRIBUTES

- Knowledge of financial planning - have or be willing to attain the CFP® certification
- Excellent technology skills for personal productivity applications
- Excellent presentation and people skills enabling positive interaction/communication with staff, clients, vendors and allied professionals
- Excellent listener
- Interested in a *long-term engagement* with Astoria Strategic Wealth
- Possess a passion to help team and clients

- Approach tasks in a systematic manner; detail oriented while still having the ability to see the ‘big picture’. The ability to prioritize workload is critical to success.
- A love of learning; ability to thrive in a changing environment
- An ability and desire to “work-from-home”. Astoria Strategic Wealth does not maintain a traditional brick-and-mortar office as our team, as well as our clients, are geographically dispersed. As such, an appropriate professional environment to work-from-home is required to include a high-speed internet connection and a secure, quiet office-space.

FUNCTIONAL RESPONSIBILITIES

- To work directly with team members and to participate in client meetings in support of the Advisor and/or Client Service team members.
- To learn, utilize, leverage, embrace, extend and assist in improving all systems used to support the business. To be compliance minded with a desire to follow, promote and enhance all compliance standards, efforts and objectives.
- To work with clients and prospects to provide the following client-centric value propositions enabling differentiation from financial advisory commoditization channels (eg. Robo-advisors).
 - ❖ *Organization.* We will help bring order to our client’s financial lives, by assisting in getting their financial house in order (at both the “macro” level of investments, insurance, estate, taxes, etc., and also the “micro” level of household cash flow).
 - ❖ *Accountability.* We will help our clients follow through on financial commitments, by working with them to prioritize your goals, prompt them on the steps they need to take, and regularly review their progress towards achieving them. We seek to help ourselves, our clients, our vendors and our allied professionals be “accountable to their best intentions”.
 - ❖ *Objectivity.* We bring insight from the outside to help clients avoid emotionally driven decisions in important money matters through education, transparency, and consistency in communication.
 - ❖ *Proactivity.* We work with our clients to be prepared for life transitions (e.g. “life happens” – perceived as good or bad) and to be supportive during those transitions.

- ❖ *Education.* We will explore what specific knowledge will be needed to succeed in their situation, by first understanding their situation, and then providing the necessary resources to facilitate their decision making by explaining options and risks associated with each choice.
- ❖ *Partnership.* We attempt to help our clients achieve their best possible life, and will work in concert with them to make this possible, by taking the time to clearly understand their goals, values, worries, communication style, constraints, etc., and then to work collaboratively with them as their style and permission dictate.