### **Internship Program**

Chessman Wealth Strategies, a growing wealth management firm in Dallas, is seeking an intern for the Summer of 2023 to assist us in our mission of helping clients achieve their financial goals.

Description: The intern will be given an opportunity to shadow and work closely with the wealth advisory team, operations team, and marketing team. This internship is designed to give the intern exposure to each of the departments that make up a wealth management firm. The intern must be able to work effectively with other staff members, clients, and the wealth advisors to continuously improve the client experience. Responsibilities will include working on financial planning for our clients, onboarding new clients, data management, marketing implementation, and special projects.

Pay Scale: $20/hour for 40-hour work week.

Responsibilities:

* Identify, develop, and improve firm processes to maximize firm efficiency.
* Effectively prepare and process client requests and paperwork.
* Collaborate with leadership team to help guide the growth of Chessman Wealth.
* Track and drive open prioritized issues to completion.
* Communicate with clients in person, in writing, and over the telephone.
* Complete special projects as needed.

Qualifications:

* Seeking a career in financial planning
* Enrolled in a university-backed financial planning program.
* GPA: 3.0 or greater
* Alignment with our Core Values and Mission Statement
* Efficiency with Microsoft Office

Our Core Values:

* Kingdom Focused
* Servant’s Heart
* Constant Improvement
* Get Stuff Done
* Fun

Mission Statement:

Our mission is to help others make smart choices about their money, so they can worry less, enjoy life more, and ultimately become better stewards with the resources God has entrusted to them.

If interested, send your resume to brandon@chessmanwealth.com