INTERNSHIP in FINANCIAL PLANNING
Cornerstone Wealth Advisors, Inc.

Cornerstone Wealth Advisors, Inc. ([www.CornerstoneWealthAdvisors.com](http://www.CornerstoneWealthAdvisors.com)) is a comprehensive financial planning, advisory and wealth management firm in Minneapolis serving clients in nearly 30 states and several foreign countries. Our only compensation is the fees paid directly to us by our clients. We are known nationally for our work and writings in retirement distribution planning, career path development for young financial planners and the national leadership of the Financial Planning Association (FPA).

We are currently seeking candidates for a Financial Planning Intern to begin in-person or remote this summer. A successful Financial Planning Intern will have an opportunity to be our next Financial Planning Resident in 2023, if desired.

Responsibilities:

- **Client Interaction**
  - Participate in 3-4 client meetings each week from Day 1
  - Complete follow-up communication and implementation from client meetings
  - Participate in the development and presentation of financial plans to clients
- **Back Office Support**
  - Submit portfolio trades online
  - Update client data base in follow-up to review meetings
- **Administrative Duties**
  - Assist in answering incoming calls
  - Prepare forms for ongoing client plan implementation
  - Scan and organize client documents into client database
- **Complete various financial planning and/or investment research projects as needed**

Qualifications:

- Trustworthy, ethical, appreciative, hard-working emerging professional
- Commitment to a career as a financial planning professional
- Enrollment in a financial planning curriculum at a CFP Board Registered Program
- Outstanding academic achievement
- Excellent oral and written communication skills
- Aptitude for applying financial planning knowledge to real-life situations
- High personal standards with a team-oriented, fun-loving nature toward colleagues

Compensation:

- Competitive hourly wage
- Paid attendance to local FPA chapter meetings
- Introduction to our network of established planning firms around the country

Contact:

Please email your resume and cover letter to [andrea@cornerstonewealthadvisors.com](mailto:andrea@cornerstonewealthadvisors.com) by March 14, 2022. Resumes should include a cover letter that states why you would be a good fit for this position and your three most defining characteristics or attributes.