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| Financial Planning Internship  Summer 2022 |

LKJ Financial, located in Houston Texas is a comprehensive wealth management and financial planning firm, inspiring clients to become informed so they can make sound financial decisions in their best interest. Our firm is seeking a financial planning intern to join our team in person for the summer to gain practical, on-the-job experience in the financial planning industry.

Responsibilities:

• Sit in on and take notes for advisors during meetings with clients and prospective clients

• Discuss cases with advisors and manage data entry for financial plans and/or client reviews

• Assist with firm’s social media presence as well as prep/staffing for marketing events

• Office admin (e.g. digitizing physical files, scanning and organizing, database maintenance)

• Special projects as needed (e.g. research new software or opportunities for advisors)

• No cold calling

Qualifications:

• Ability to work both independently and collaboratively

* Professional attitude/behavior in a business setting with high standards of reliability

• Desire to pursue a career in financial planning

Our Ideal Candidate:

* Has the heart to teach financial wisdom and independence

• Has an entrepreneurial spirit and desire for personal growth

• Enjoys working in a team environment

What You Will Gain

* Increase your industry knowledge

• Learn about different roles and responsibilities within a firm

• Valuable, real-world experience

• Refine your career path and goals

Contact

Please email your resume to: **adam@lkjfinancial.com** by June 3rd, 2022. Resumes should include a cover letter defining why you think you might be a good fit for our team. Once we review your resume, we will reach back out to you to schedule an interview**.**