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**Strategic Wealth Advisor Team Internship Summary**

We are seeking an energetic, responsible intern to join our thriving wealth management firm. In this position, you will be expected to learn the ins-and-outs of our daily routines and procedures. You will focus on learning how our organization runs.

**Intern Duties and Responsibilities**

Answer phone inquiries, and incoming calls, and provide basic company information; oversee mail deliveries, packages, and couriers

Perform clerical duties, take memos, maintain files, and organize documents; photocopy, fax, scan etc. as needed

Manage databases and input information, data, and records

Attend company functions and client events

Shadow multiple office positions and train in a variety of tasks

Learn financial planning, wealth management, and other advisory elements

No cold calling or outbound marketing responsibilities

**Intern Requirements and Qualifications**

Must currently be in Junior or Senior year of an accredited university/college program

Proficient computer skills, including Microsoft Office Suite (Word, PowerPoint, and Excel)

Must be 18 years of age

Excellent written and verbal communication skills

Self-directed and able to work without supervision

Energetic and eager to tackle new projects and ideas

**To inquire, please contact:**

Jennifer Beiler

[jennifer.beiler@ampf.com](mailto:jennifer.beiler@ampf.com) or call (469) 865-1022

Please visit [Strategic Wealth Advisor Team - Plano, TX | Ameriprise Financial (ameripriseadvisors.com)](https://www.ameripriseadvisors.com/team/strategic-wealth-advisor-team)for more information about us!