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 Theresa Updegraff:

- email: Theresa.Updegraff@ampf.com
- phone: 469.865.1026

Please visit www.StrategicWealthAdvisorTeam.com for more information about us!