GOLUB GROUP
BUILDING SUSTAINABLE WEALTH

Wealth Management Intern

Join an acclaimed and collegial, 30-person financial advisory firm, founded in 2003, with a goal to be one of the most admired advisory firms serving high-net-worth individuals in the Bay Area. Golub Group currently manages $1.5B in AUM (with a goal of $4B by 2025) combining in-house investment management and wealth management expertise to build long-term relationships with its clients.

Position Description

- Gain experience working in a professional environment
- Learn how to strategize/problem-solve in a team environment to help clients achieve financial goals
- Experience what it is to play a critical role in promoting client loyalty and a world-class client experience
- Develop relationships with potential mentors, who are leaders in the wealth management field

Reports to: Financial Planning Associate Manager
Job Level: Non-Exempt

Date: Summer 2018 (~May-August)
Please submit your resume to: recruiting@golubgroup.com

Job Summary

A Wealth Management Intern supports the private client group by shadowing the team and assisting with client service requests and special projects. This individual must have strong critical-thinking skills and work well individually as well as part of a team. A qualified candidate is a clear communicator, is detail-oriented, has a high degree of follow-through, handles multiple tasks efficiently, and thrives in a fast-paced working environment where each day is different. One will be exposed to a variety of financial topics including but not limited to, cash flow analysis, retirement planning, insurance and risk management, and education planning.

Duties and Responsibilities

- Works closely with the firm's most experienced Financial Advisors
- Shadows Financial Planning Associates and Financial Planning Associate Manager
- Interacts with other team members and departments to provide excellent client service
- Completes client and advisor requests and any special projects as assigned by manager
- Helps to schedule client meetings and prepare meeting presentations
- Inputs data into financial planning software
- Data entry into Advisor CRM
- Answer phones

Qualifications

- Enrolled college student (Junior/Senior)
- Proficient in MS Office
- Cooperative spirit and drive; Ability to work independently but also in a team
- Excellent communication, organizational, interpersonal skills, and phone etiquette
- Strong attention to detail and ability to follow through on projects effectively

Compensation - $15/hour (not eligible for employee benefits)

The Golub Group, LLC is an Equal Opportunity Employer

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www.golubgroup.com