

## FINANCIAL PLANNING INTERN JOB DESCRIPTION

### JOB SUMMARY

The Financial Planning Intern works closely as a member of the Wealth Management Team in the preparation and follow-up on client cases, entry of client information and financial data into planning software, and various project related activities.

### JOB RESPONSIBILITIES

- Comply with all policies and procedures of the firm
- Complete data entry and case analysis in financial planning software applications such as eMoney, Money Guide Pro, and tax planning software
- Help manage tasks and follow ups for clients
- Help manage account and data set-up in Tamarac Reporting and Trading programs
- Assist with firm projects that will be determined at the time of the internship but will encompass firm operations, business development, wealth management, and investment management
- Attend client meetings and take notes for the planning team

### JOB REQUIREMENTS

#### Education:

- Enrollment in a CFP Board registered Certificate Program required
- Starting Junior year in college at a minimum

#### Other:

- Excellent communication skills
- Strong client service skills
- Ability to maintain absolute confidentiality
- Accurate and detail oriented
- Ability to handle a variety of duties and balance competing deadlines
- Professional demeanor