

UNPAID INTERNSHIP IN FINANCIAL PLANNING PRACTICE

Seeking organized, motivated self-starter to do an unpaid internship in a small but highly productive financial planning firm. This individual will have the opportunity to work closely with two CFPs who manage over \$150 million in client assets. The duties will be wide ranging and may include projects w exposure to investment software, insurance software, data entry, and will also include administrative work. This will provide an opportunity to experience what it is like to run a financial planning firm, run a small business and learn about the underpinnings of building a successful financial future. We have had great success with our interns for the past few years and have gotten good feedback about how our internship has helped past interns find jobs. This is a 12 month internship and we are looking for an intern who is willing to work 2 days a week (full or part days). Past interns have included students from Sonoma State, USF, UC Berkeley, University of San Diego, Colorado College and local high schools.

Internship Description includes:

- * this position is unpaid
- * 2 days a week
- * finance major not necessary
- * motivated high school student is OK
- * data entry
- * database updates
- * misc: errands, shredding, mailings
- * hand addressing envelopes
- * copying
- * meeting prep and follow up
- * processing paper work

This is an ideal opportunity for a student who would like to learn about the financial services industry and build their resume. This person must be friendly and personable with the ability to multi-task, prioritize and complete tasks. This is an excellent opportunity for someone who would like to learn about working in the financial services industry and see what it is like to run a \$100M+ financial planning practice. Knowledge of Excel a plus.

Please send resume to Ryan Romines in care of Emily Stickel
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