Financial Planning / Investment Analyst Intern

Responsibilities will include those typical of our Associate Advisor role, working with an experienced professional to serve clients of the firm. You will be an integral member of our team. This is a 12-week position commencing June 4, 2018.

Responsibilities

- Support / assist Advisors as they work with clients to analyze, research, and implement solutions with respect to financial planning and portfolio management by:
  - Preparing for client meetings
  - Documenting and executing client meeting follow-up tasks
  - Maintaining Client Relationship Management (CRM) records of meeting notes
  - Assisting Advisors with administrative tasks
- Support / assist Advisors as they work with client portfolios by:
  - Auditing Investment Policy Statements (IPS) to reflect current investment goals and objectives of the client as well as current strategies that we may employ to meet these goals and objectives
  - Communicating as needed with new and existing clients
- Support firm investment process by:
  - Preparing research reports on stocks, bonds, Exchange Traded Funds (ETF), and mutual funds
  - Evaluating corporate and municipal bond ratings
  - Assisting with account reviews and preparing for portfolio rebalancing
  - Evaluating securities for suitability for client portfolios
  - Assisting with compliance and other necessary record keeping
- Support of first line of customer service (our front desk and first telephone contact for clients) as needed by:
  - Demonstrating excellent people skills, listening well, being pleasant and confident in the delivery of information to clients, vendors and other members of the community
  - Conveying accurate messages to Advisors and other team members
- Maintain high ethical standards and confidentiality at all times
- Participate in firm networking, prospecting, and marketing activities
- Participate in staff, investment committee, and marketing committee meetings

Our intern will be responsible for learning our processes and systems, as well as becoming proficient in the industry-standard software we utilize to serve clients (PieTech MoneyGuidePro, Tamarac AdvisorView, Rebalancer, CRM, Microsoft Office). Input on improving our systems and marketing efforts is expected.
Personal Development

- Develop planning, organizational and time management skills
- Increase knowledge of technology and build on existing computer skills
- Develop team-based work competencies
- Develop interpersonal skills in order to communicate with external clients, industry colleagues, and other team members

Qualifications and Skills

- Strong educational credentials (currently enrolled in a BA/BS program at an accredited college / university) and analytical background
- Demonstrated interest in financial planning, or currently enrolled in a CFP Board registered educational program
- High degree of integrity and motivation, along with a strong work ethic
- Intellectual curiosity and an aptitude for learning quickly
- Self-starter, problem solver and a goal-oriented team player
- Ability to work independently
- Excellent computer literacy and proficiency with Microsoft Office
- Exceptional communication skills

Compensation

- This is a full-time, 12-week internship with a $14.00 hourly compensation rate

Application Process

Submit, via e-mail to lucieestabrook@deighan.com, a letter of interest, resume, academic transcript, three (3) professional references, and a relevant topic writing sample. The successful candidate must complete an application for and undergo a background check. The application period for this position closes on April 15, 2018, all required documents must be submitted by that date.