SAMPLE INTERNSHIP JOB POSTING

FIRM Financial Planning Objective:

Provide students and CFP® Candidates real world experience in a fee-only comprehensive financial planning firm in order to advance the profession.

Position Description

An opening is available in our office for an individual seeking to fulfill the experience requirement for CFP® certification. For qualified, motivated applicants, this position offers exposure to virtually all facets of a fee-only comprehensive financial planning practice. Depending on qualifications and experience, this may include opportunities to provide supervised assistance in areas such as:

• Investment Management research, analysis and reports

• Administration and Operations

• Financial Planning – Initial financial plans and periodic financial plan reviews/updates

• Research and Special Projects

• Attendance in some client meetings is anticipated

This position requires a minimum of 200 hours with a minimum commitment of 8 hours per week. The work schedule is flexible with hours to be agreed on before the internship begins. Term of the internship is 3 months.

Minimum Position Requirements

- ✓ Currently enrolled in a CFP® program, with completion of at least Investments and Fundamentals of Personal Financial Planning or the equivalent
- ✓ Must have experience with Excel and Word and be comfortable in a Windows environment
- ✓ All interns will sign an agreement to keep client and trade secrets confidential
- ✓ Interns will agree to operate under the values and ethics of the CFP Board, FPA and NAPFA

This internship can be partnered with the ***SCHOOL NAME*** Internship Program. Credit is granted toward the CFP® experience requirement.

CONTACT INFORMATION & HOW TO APPLY

SAMPLE INTERNSHIP JOB POSTING

CFP® INTERNSHIP POSITION OPENING

Sponsor: FIRM NAME

CONTACT INFORMATION

Send resume via email to: xxx@xxx.com

Internship Description

An internship opportunity is available in our office for an individual seeking to fulfill the experience requirement for the Certified Financial Planner® (CFP®) certification. For qualified, motivated applicants, this position offers exposure to a nationwide financial planning and financial coaching firm. Our firm is a leading provider of financial and legal programs for Employee Assistance Plan (EAP) organizations, membership associations, insurance companies, national marketing entities, and the general public. We provide services to more than 24 million households and over 15,000 corporations.

Depending on qualifications and experience, the internship provides supervised experience in areas such as:

- Client relations
- Marketing
- Financial plan preparation
- Financial coaching
- Quality assurance
- Process refinement and implementation

The internship would include a total of 150 hours over a 10-week period.
The daily work schedule would be based on our needs and the intern's availability.
The intern will work under the direct supervision of the Financial Coaching Manager.

Minimum Position Requirements

- Bachelor's degree
- Currently enrolled in the UNIVERSITY NAME Personal Financial Planning Certificate program with completion of three (3) required courses, including Fundamentals of Personal Financial Planning
- Demonstrated experience with Word, Excel, Outlook, Internet Explorer, Google, and Windows 2000 or XP
- Demonstrated written and verbal communication skills
- Detail oriented

CONTACT INFORMATION

SAMPLE OF AN INTERNSHIP PROGRAM
(12 WEEKS)

Goal:
To observe and assist in a financial planning practice from operations to the planning process with clients.

Week One – 10 hours:

- ✓ Mirror Administrative Assistant and use of filing, phone, mail and data base system
- ✓ Assist in scheduling new and review client appointments
- ✓ Introduction to Client Servicing with Client Services Manager
- ✓ Learn about prospectuses
- ✓ Observe portfolio software
- ✓ Mirror Operations and compliance officer

Week Two – 10 hours:

- ✓ Engage in the planning experience
- ✓ Attend an initial interview
- ✓ Review client files and date questionnaire
- ✓ Discuss with planners how they use planning software
- ✓ Discuss with planners how they use portfolio analysis software
- ✓ Discuss with computer technician the integration of the programs

Week Three – 10 hours:

- ✓ Attend the weekly planners meeting
- ✓ Work on specific tasks as outlined

Weeks Four through Twelve – 10 hours/week:

- ✓ Continue with specific tasks and projects outlined