



## Yeske Buie Summer Financial Planning Intern (2024)

---

Yeske Buie, a leading wealth management firm, is seeking to hire an Intern for the summer in our San Francisco, CA office. We are looking for candidates from financial planning programs. The position includes professional, technical, and administrative work. To find out more about Yeske Buie, go to [www.YeBu.com](http://www.YeBu.com).

This internship is a rare opportunity to work closely with a dynamic and innovative Financial Planning Team and Support Staff. During this time, you will have an inside look of what Financial Planners truly do. You'll gain invaluable experience in terms of understanding portfolio management, the planning process, trading, etc.

### **Duties, will vary over time, but will include:**

- Preparing several types of financial reports for Client meetings and have an opportunity to sit in on at least one meeting with a Client to discuss their portfolio and address other queries.
- Uploading financial reports to Clients' unique Client Private Page® on the company website.
- Asset management support (ex. research, reviewing Client accounts, unrealized/realized gains tracking, checking for margin balances in Client accounts).
- Financial planning support (ex. research, data consolidation in support of financial planning projects, testing new software for application at the firm).
- The opportunity to learn **seven** or more software programs to enhance your financial planning acumen.

### **Other Responsibilities:**

- Answering Phones
- Business Development Support (ex. tracking Client data, preparing marketing mailings, supporting social media output)
- Client Service Support (ex. preparing paperwork)
- Administrative Responsibilities (ex. scanning and filing, Client digital folder clean-up and system updates for SEC compliance)
- Data Entry, Database Clean-Up, Maintenance and Quality Control

**Logistics:** This is a paid position. Yeske Buie will provide a small housing stipend, but the Intern is responsible for securing and paying for accommodations for the duration of their internship. Additionally, it is an expectation that every member of the Yeske Buie team has received the COVID-19 vaccine/recommended boosters and will provide that documentation during the new hire process.

**To Apply:** Email your resume, cover letter, and an unofficial copy of your transcript to [Sydney@YeBu.com](mailto:Sydney@YeBu.com).

LIVE BIG