



Deseret Mutual Benefit Administrators
Financial Planning Internship Posting

Position Description:

- Assist the certified financial planners throughout the planning process from client engagement to financial plan implementation.
- Twenty hours per week for six months.
- Schedule flexible around school schedule.

Educational Requirements:

- Must be enrolled in an undergraduate financial planning degree program.
- Juniors and seniors preferred.

Other Requirements:

- Passionate about financial planning with a sincere desire to help others.
- Able to work in a team environment, be proactive, and ask questions.
- Desire to continually learn, grow, and stretch.
- Critical thinking skills and the ability to apply information.
- Proven ability to meet deadlines.
- Familiar with financial planning concepts and vocabulary.
- Exposure to financial planning software and client relationship management software.
- Able to use a financial calculator.
- Excellent written and oral skills.
- Previous internship experience preferred, but not required.

Primary Responsibilities:

- Process client data and input into financial planning software.
- Speak with clients on the phone to provide service, clarify data, and schedule appointments.
- Interpret a financial analysis and develop strategies and recommendations.
- Attend staff and training meetings as a full member of the team.

Opportunity to:

- Sit in on client meetings.
- Meet with certified financial planners for mentoring and career counseling.