



**Employer: Wilson Wealth Management**

**Title: Financial Planning Intern**

Wilson Wealth Management is seeking a Financial Planning Intern. This paid intern will be responsible for the following:

- Actively service client accounts by processing necessary paperwork for accounts, track and monitor account/asset transfers, process transaction requests as directed. Create investment and rebalance analysis, RMD (Required Minimum Distributions) calculations and distributions
- Learn how to navigate and use the primary client software and websites (MGP, Advyzo, TD Ameritrade)
- Handle client requests and matters in a timely and efficient manner
- Assist with the preparation of comprehensive financial plans including cash flow management, risk management, investment planning, tax planning, retirement planning, and estate planning
- Coordinate client servicing tasks with Lead Advisor
- Assist with the reconciliation and review of financial data
- Conduct investment research for clients or firm-wide initiatives
- Research and update cost basis information
- Participate in client meetings, as appropriate
- Assist in the review and allocation of 529 college savings plans
- Research client issues as directed and present data
- Assist with the preparation of client communication
- Other duties as may be requested

Hours, begin and end date, and holiday schedule will be agreed upon with direct supervisor. The Intern is encouraged to seek internship course credit through the University of Utah. For more information, contact the Internship Coordinator (Dominique Blanc, [dominique.blanc@csbs.utah.edu](mailto:dominique.blanc@csbs.utah.edu)).

**Qualifications and Requirements:**

- Excellent communication skills and professional presentation, as you will be working directly with the clients
- Self-Starter: self-learning is key
- Strong analytical skills and the ability to work with professionals across all levels of the organization
- Previous Industry Experience (A different internship/part time work)
- Knowledge or willingness to learn to use an email marketing system (Mailchimp)
- Knowledge of TD Ameritrade operations and VeoOne a plus
- Knowledge of MoneyGuidePro or other financial planning software
- Currently pursuing Bachelor's Degree. Preference given to Accounting, Finance, Economics, or Mathematics majors
- Enrollment in a CFP Board-registered program preferred
- Approximately 20 hours a week. Schedule can be flexible
- Someone who wants to be exposed to all areas of an RIA

To apply, send your cover letter and resume to Troy Wilson: [twilson@wwmutah.com](mailto:twilson@wwmutah.com)