True Wealth Design Financial Planning Internship Program Description

COMPANY PROFILE:

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True Wealth Design (www.TrueWealthDesign.com) is a registered investment advisory firm, headquartered in Akron, OH. We help clients plan for and achieve their life goals through holistic wealth management, including life planning, financial planning, investment management, and tax and insurance services. We are small but well-established and fast-growing firm that serves clients with high-touch service and quality advice.

INTERNSHIP POSITION OVERVIEW:

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True Wealth Design's internship program is for junior or senior year students currently working towards a four-year degree, preferably in a Certified Financial Planning (CFP®) track program and who plan to sit for the CFP® examination upon graduation. Our internship is 12 weeks in length and top-performing interns may be asked to work year-round. You will learn from the ground up—both the operational and advisory-related sides of our wealth management business. We provide exceptional students with the opportunity to apply classroom education to real world situations and get a leg up on their career.

REQUIRED QUALIFICATIONS & ATTRIBUTES

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Entering junior or senior year as of June with GPA of 3.0+ and enrolled in financial-planning-track university program (may also consider Finance, Economics, Family Resource management, or Accounting majors).

Ability to work year-round strongly preferred: initial 12-week internship with 15-32 hours/week in the summer and, based on merit, may offer to extend internship to 10-15 hours/week during semesters.

Optimistic, friendly, pay great attention to detail, and have a no-job-is-beneath-me attitude.

Ability to clearly and effectively communicate verbally and in writing.

Excellent computer skills including Microsoft Word, Excel, Power Point and Outlook.

Basic understanding of investment and financial planning concepts. Individual income tax knowledge helpful.

Due to sensitivity of client information, True Wealth Design will perform background and credit checks on all candidates. Candidates must sign a confidentiality agreement.

ROLE & RESPONSIBILITIES:

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<u>Support to Wealth Advisors (Advisory Duties):</u>

-Client meeting preparation and follow-up

-Preparation of client wage summary and cash flow summaries in Excel

-Input of client information into Social Security Analyzer (Social Security software program)

-Input of client information into Money Guide Pro (financial planning software) for analysis

-Input of client account holdings into Morningstar Office (portfolio software) and running related reports

-Assist with investment research for tracked mutual funds/ETFs and other financial data used to set investment policy allocations

<u>Support to Client Service Administrators (Operational Duties)</u>

-Scanning/filing client financial documents within our system

-Preparation of prospective client packets and similar documents

-Preparation of Letters of Authorization (LOIs) third party for outside accounts/policies

-Note/task entering/maintenance of client database

-Preparation of savings bond analysis

-Set up/clean up client meeting rooms

-Completing paperwork

-Tracking client money movement in custodial software

NEXT STEPS:

If you are the person for this position, be ready to show us by emailing (1) a cover letter explaining why you are a good fit for the position and (2) your resume to SStuchal@TrueWealthDesign.com. Thank you in advance for your submission.