

Family Office Financial Planning Opportunity

Clint Argyle, a serial Entrepreneur, Investor and Philanthropist is looking for a graduated financial planning student to help with the following:

This intern position can lead to a permanent position after a few months trial period and your graduation. Your goal is to help with our family estate to do a variety of tasks, including, but not limited to the following responsibilities.

- Meet with and take notes of meetings with an experienced Financial Advisor and CFP, COU, ChFC and RIA Harold Smith.
- Work with excel at a proficiency level.
- Review prospectuses for investment opportunities, including Stocks, Bonds, REITS, Alternative Investments, and others investment products.
- Research Exponent Philanthropy resources to find best practices for our Foundation.
- Attend and conduct financial planning meetings with clients apart of the estate.
- Develop financial plans for clients apart of the estate.

Qualifications and skill preferred for this internship include the following:

- Finished or in senior year of Financial Planning or Finance Degree
- Communication skills
- Written skills
- Basic knowledge and experience with Google Sheets and Excel
- Teachable
- Honest
- Hard Working
- Working towards a CFP
- Willing to sign an NDA for confidentiality

Compensation as an intern is \$20 per hour and will then be negotiated during the hiring process for the permanent position.

If interested, please contact Ethan Gunn, or Adam Meadows.

Ethan Gunn

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Adam Meadows

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