

EP Wealth Advisors, Inc.
Position Description

Position: FP Intern/Staff

Reports To: Financial Planning Manager

Location: Salt Lake City, Utah

Summary: Supports our financial planning department. Role will include a combination of administrative duties as well as analytical skills.

Roles and Responsibilities:

- Work closely with the financial planning director to support development of personal and business financial plans.
- Ability to solve problems and create workarounds, resourceful.
- Format and proofread client action plans.
- Assist the department in preparing and updating presentations and corresponding material
- Assist clients with their personal financial sites
- Create, review, and enter data into spreadsheets to analyze specific financial planning and/or business planning issues.
- Perform research on financial planning topics as needed.
- Perform additional functions, duties and specific tasks of a similar nature and scope as necessary to support personal and business planning.

Qualifications:

- Undergraduate degree required (or in the process of completing)
- Strong interpersonal skills with the ability to work well with others.
- Strong attention to detail and accuracy.
- General interest in financial planning and wealth management issues.
- Ability to organize, present and communicate data.
- Ability to multi-task and work well under pressure.
- Familiar with Windows and Microsoft Office, proficient in excel/PowerPoint; eMoney and Money Guide Pro experience a plus

Please provide your introductory information to Scott Sayre.

Ssayre@epwealth.com