FRANDSEN MORRILL ADVISORS - INTERN

Description:
The FMA Intern will have planning, marketing, and operations duties in order to give them experience in all areas of the financial planning process. The primary duty of the FMA Intern is to work within our planning software and prepare every advisor within the firm for their upcoming client meetings.
In addition, the FMA intern will assist advisors in their marketing efforts by identifying and contacting potential clients to set up an introduction meeting to the firm. Finally, the intern will assist the firm's Client Service Specialist and the Director of Operations with miscellaneous client service items.

Planning Duties:
- Prepare all advisors of the firm for upcoming comprehensive review meeting by updating the client's plan within our planning software.
- Prepare advisors in the firm for their draft meetings by inputting information into the financial planning software
- Prepare advisors in the firm for their recommendation meetings by preparing investment proposals and insurance illustrations

Marketing Duties:
- Identify potential clients within our firm's target markets and import data into firm's CRM system.
- Contact potential clients within our primary markets to offer an introduction meeting to our advisors and our firm

Operations Duties:
- Assist Client Service Specialist with periodic service duties
  - CRM updates for clients
  - CRM Imaging for clients
- Miscellaneous Operations tasks from Director Of Operations

Preferred Skills:
- Experience with financial planning software (E-money and Money Guide Pro), client relationship management software (Redtail Preferred)
- Excellent analytical skills by having the ability to collect and analyze information, problem solve, and make decisions on your own
- Outstanding interpersonal skills with ability to work as a team
- Highly organized and very efficient in completing tasks with accuracy
- Trustworthy, reputable and ethical, as you will be dealing with very personal and private client information
- Excellent computer skills and comfortable working in a Mac and Windows Environment
- Appropriate written, grammatical and math proficiency.

Qualifications:

- Currently enrolled in Utah Valley Universities Personal Financial Planning Program and in your last year of the program
- Goal of becoming a financial advisor upon receiving Bachelor's Degree in Financial Planning or other related field

Job Status:

-Paid Internship - $12 per hour, plus bonus program for marketing efforts
-Part-time, 15-20 hours per week.
Start Date – Feb 2021

To Apply:

Please email cover letter (**required**) explaining why you would be a good fit for this position and resume to:
Travis Ewell
Travis@retirefma.com