Paid financial planning internship in the Roseville, CA.

Since opening our doors in 2008 we've helped people manage their investments and taxes. Today, we offer our clients a comprehensive array of financial services, so they can get answers to their financial questions and move forward with confidence.

We are seeking the best that your school has to offer. The bar has been set high and you would be expected to continue that legacy. Your professionalism in demeanor, dress, and speech are expected. The ideal intern would be one proficient with a wide array of software, e.g. Microsoft Office (obviously), Salesforce/Orion, and Money Guide Pro. You should also have the ability to write professional quality letters to clients, be self-motivated, and willing to learn and ask questions.

There are many approaches that firms can take in the financial planning field. Our firm is an advocate of the fee-only, fiduciary based approach. We believe this approach allows us to better align our interests with client interests. We help clients with investment choices in order to help them achieve their goals.

Qualities we look for:

- Likability
    - Would we enjoy spending our day with you?
    - Do you bring an upbeat energy with you wherever you go?
    - Able to laugh, and make your workday enjoyable.
- Positive attitude and sincere willingness to constantly learn and grow
    - We are all human with an array of emotions. When you walk through our front door in the morning, are you excited to see your colleagues and begin the adventure of a new day?
    - When you leave the office at the end of the day, do you feel tired but fulfilled? Excited to begin the next day where you left off?
    - When we decide to change a procedure, do you push back or forward? Is the reason you are pushing because of fear? Pushing forward comes from a desire to learn and improve; being open to new ideas.
    - If we were to survey your colleagues, would they say that they have to tiptoe around your moods? Would they say that they feel better for having spent their day with you?
        - Be the type of person that you would enjoy working with
    - When a mistake is made, do you own it; or try to pass the buck?
        - Have you ever uttered the words "Not my fault"?
    - Do you feel a strong desire to continually push yourself to improve in both your personal and professional development?
- Understanding (or willingness to learn) of major financial planning components such as:
    - Financial planning process
    - Financial statements
    - Investment principles and mutual funds
    - Equities and debt instruments
    - Tax Planning
- Follow through with assigned tasks
- Perform functions with exactness and attention to detail
- Polite and clear communication

- Effective communication with clients and other advisors/staff
- Ability to learn and adapt to different financial planning software and client relationship management (CRM) systems

As a Financial Planning Intern your functional responsibilities/opportunities would include:

- The opportunity to be part of our team. You would have the opportunity to work directly with advisors and staff in creating account paperwork, managing portfolio allocations and ongoing client management
- General office duties
- Being a friendly and positive influence on those around you
- Helping improve the client experience by attentively serving drinks to clients
- Developing and implementing office/administrative work flows
- Other lame stuff that nobody else wants to do
- Input client data, and preparing reports, statements, charts, graphs, and other visual aids to be used in client meetings
- Other responsibilities as directed by internship leaders based upon your field of study and interests (including but not limited to statistical analysis, marketing, communications, business development, finance, tax, estate law)

Time will be allocated for you to create and develop your internship project so that you can fulfill responsibilities for any internship requirements.

Opportunity for full time employment after graduation as well as a defined career path.

Before communicating with us, be sure to review our website at www.parkshorewealth.com

If you got progressively more excited about this opportunity as you read the above description, we would love to schedule some time to do an interview.
To begin, send the following to me at daniel@parkshorewealth.com

- Cover Letter telling us why you would like to work at Parkshore
- Unofficial Grade Transcript
- Resume

Daniel C. Andersen, CFP®
Senior Advisor

PARKSHORE
WEALTH MANAGEMENT

(916) 797-3007

Socialize with us