Traditions Wealth Advisors

Financial Planning Internship

Independently owned and operated, Traditions Wealth Advisors is a holistic financial planning and wealth management firm located in College Station, Texas. **Traditions Wealth Advisors utilizes well known asset custodians such as FIDELITY Institutional.** We are looking for long-term applicants to start in May and continue through the school year until the following May.

Many of our past interns have signed with Fortune 500 companies, the Big 4 Accounting firms or gone on to gain careers on Wall Street after completing their internship and degree at TAMU. Our internships provide you with the knowledge and experience you need to be competitive in the real world.

Duties:

- Prepare and organize client meeting materials
- Analyze and research financial planning subject areas to aid the CFP's with client decisions
- Process client service requests
- Conduct information gathering and digital input process for new clients
- Facilitate implementation of office-wide infrastructure projects (e.g. digitize client information)
- Collaborate with the CFP's and CIO to learn the ins and outs of financial planning

Qualifications:

- Must be an undergraduate junior, senior or master's student with either financial planning experience or enrollment in a financial planning curriculum (e.g., Texas A&M's Financial Planning
- Required to have and maintain a 3.0 GPR in an economics or business field degree minor
- Proficiency with Microsoft Excel, Word, and PowerPoint is necessary
- Needs to be organized, efficient and detailed-oriented with a genuine interest in financial planning
- Experience with retirement and insurance planning, MoneyGuidePro, Morningstar Office, Redtail or NetDocuments is helpful

More Information:

- Number of openings (per position): 1
- Workdays/Times: Monday-Friday/9am-5pm
- Hours per week: 10-15
- Starting Wage/Salary: $10.00 per hour (+ semester bonus)
- Job location: Off campus (in College Station)

To apply, please email your resume, cover letter and an unofficial transcript to:
Michael@TraditionsWealthAdvisors.com
or
visit our website www.TraditionsWealthAdvisors.com/Internship-Opportunities