



Financial Planning Intern

Reports to: Chief Operations Officer

Benefits: No

Status: Part-time; Non-Exempt

Hours: 15 hours per week

We are a wealth management firm and since 1982, we've provided personal, proactive advice to high-net-worth clients seeking a better life for themselves, their loved ones, and generations yet to come. Today, we proudly serve clients near our Reno office and original Southern California location, as well as various other parts of the country. We believe that true wealth comes from four capitals. What good is money without the health to enjoy it? The knowledge to protect and grow it? The peace of mind to share it? At SFG, we care as much about our clients dreams as their dollars. That's why we seek to integrate many aspects of their life into one plan that addresses their four capital needs – financial, physical, psychological, and intellectual. We call this approach Integrative Personal Planning.

Position Overview: The Financial Planning Intern provides support to the Financial Planning team.

Duties & Responsibilities

- Enter data into the Financial Planning program, the CRM program, and other databases as needed.
- Create drafts of Net Worth Statements.
- Conduct research on topics as requested.
- Generate financial planning and investment-related reports as needed.
- Assist other SFG team members with:
 - Processing and submitting client paperwork.
 - Portfolio implementation process (e.g., scanning docs; exporting trade files; verifying completed trades).
 - Assembling financial and investment plans.
 - Client meeting preparation.
- Populate and manage investment-related data in Excel.
- Prepare Risk Management Reports in PowerPoint.
- Assist with special projects as needed.
- Uphold the firm's purpose, vision and values; incorporate the SFG Core Beliefs of Service Heart, Innovation, and Client Commitment in the way in which all aspects of work are approached.

Qualifications

- Pursuing a bachelor's degree in finance or economics.
- Proficiency in Microsoft Office with advanced Excel skills.

Other Skills & Experience

- Continuously exhibits personal integrity and professional initiative.
- Reliable, follows through on commitments, does not shrink from new challenges.
- Possesses a passion to help new and existing clients; has a keen understanding of truly stellar service to both internal and external clients.
- Solid strategic thinker, creative problem solver and competent decision maker.
- Must be organized, detail-oriented and able to continuously reprioritize tasks.
- Demonstrates a commitment to accuracy by delivering high quality work.
- Has strong interpersonal, verbal and written communication skills.
- Collaborative and able to work effectively with others.
- Flexible team player who is highly adaptable to change and open to new ideas.
- Demonstrates ability to work successfully in an entrepreneurial, small company environment.

Interested candidates should submit a cover letter and resume to info@sfginc.com.