



Financial Planning Intern

Company Description

The Norden Group is a team of experienced financial professionals with expertise in investment management, tax optimization, estate planning and asset protection. Our clients include business owners, working professionals, retirees, and corporations.

Job Description

The Norden Group is seeking a candidate to join our team as a full or part-time Financial Planning Intern. This position will include assisting in day-to-day tasks related to servicing clients and working together as a team.

Duties could include the following:

- Act as first point of contact for all incoming clients
- Schedule client appointments
- Answer phones, emails and send faxes
- Manage client files across multiple software programs
- Generate client reports
- Prepare for client meetings
- Assist in onboarding and servicing paperwork
- Implement company projects
- Run office errands
- Set-up and clean conference rooms

Desired Qualifications

- Effective organizational, multi-tasking, and prioritizing skills
- Excellent verbal, written, and interpersonal communication skills
- Strong independent thinking skills
- High attention to details
- Ability to work in a fast-paced deadline driven environment
- Ability to work effective independently and in a team environment
- Commitment of at least one year

Compensation

- Based on experience

To apply, please send your resume to kylee@thenordengroup.com