Personal Financial Planning Internship

Position available immediately – Our current intern is moving to a career position.

Company Description:
Amicus Financial Advisors is a registered investment advisory (RIA) firm providing a full range of financial planning and investment advisory services, such as the development of comprehensive financial plans, investment management, and ongoing financial advice.

Position Description:
The Personal Financial Planning Intern/Paraplanner will assist our Advisors in all areas of wealth management including preparation for and participation in client meetings, account maintenance, financial plan creation, and portfolio rebalancing.

Major Areas of Responsibility
The responsibilities of the Intern include, but are not limited to, the following:

- Create comprehensive financial plans for clients using MoneyGuidePro software
- Preparation for and participation in client meetings
- Monitor customer relationship management through the utilization of the Wealthbox
- Organize required regulatory compliance documents
- Review quarterly performance reports for clients
- Complete other projects and research as assigned by Advisors

Required Knowledge, Skills, and Attributes
The Intern must possess the following knowledge, skills and attributes:

- Broad knowledge and interest in personal finance
- Excellent written and verbal communication skills
- Experience with the Microsoft Office Suite, particularly Microsoft Excel
- Demonstrated ability to think critically and solve problems
- Self-motivated, driven, and proactive in completing assignments
- Enthusiastic personality and positive attitude
- Proficiency in performing detail-oriented tasks
- Honest and ethical

Benefits of Internship
The benefits and skills gained by the Intern include:

- Proficiency in Wealthbox CRM, , MoneyGuidePro, Black Diamond, Schwab Advisor Center and other softwares
- Insight into the daily responsibilities and tasks of a financial planner
- Increased financial understanding through a personal weekly training meeting.

Testimonial of Dan Maxwell, our most Amazing prior Intern

For many years I have been interested in personal financial planning. I had looked into internship opportunities with some of the large financial planning firms, but few were able to provide the experience I was looking for in terms of breadth and depth. I was lucky enough to come into contact with Larry Peterson and Amicus Financial Advisors. After speaking with him on several occasions, I realized that the opportunity to be an Intern at a smaller firm such as AFA would allow me to learn the skills I desired.

My time at AFA has been instrumental in increasing my understanding of personal financial planning. Larry allocates one hour each week to answer any questions I have and to discuss different personal finance topics. This opportunity and learning experience is completely unique to this internship, and is enormously valuable.

I am able to use a variety of PFP programs extensively, including Schwab's PortfolioCenter, MoneyGuidePro, and Redtail CRM. This technical understanding and knowledge will help me immensely as I continue my career.

I love working for AFA and for Larry. I am able to ask questions, interact with clients, and be involved in almost every aspect of the practice. This type of exposure is only available at AFA. Larry is a wonderful and patient teacher who fosters my personal growth. He allows me to think critically and make decisions that impact clients. I cannot imagine a more beneficial internship than one with AFA.

Contact Information
To inquire regarding internship opportunities with Amicus Financial Advisors, please send Larry Peterson, MS, RSP, CFP a PDF copy of your resume and cover letter (Peterson@AmicusAdvisors.com). After sending your resume and cover letter please call Larry at (801) 938-1226 to schedule an interview.