

Financial Planning Internship

Clint Argyle, a serial Entrepreneur, Investor and Philanthropist is looking for an intern to help with the following:

This internship is to help with our family estate to do a variety of tasks, including, but limited to the following responsibilities:

- Meet with and take notes of meetings with an experienced Financial Advisor, Harold Smith
- Help process and document grant authorizations for the Foundation
- Review prospectuses for investment opportunities, including Stocks, Bonds, REITS, Alternative Investments and others.
- Work with People Keep to process Health Insurance and other medical expenses for Foundation employee's
- Research Exponent Philanthropy resources to find best practices for our Foundation
- Do general research projects as needed.
- Help update investment policy statements
- Create a database of Financial information to have a system for keeping notes and plans for the future years financial planning

Qualifications and skill preferred for this internship include the following:

- Studying Finance at a University
- Communication skills
- Written skills
- Basic knowledge and experience with Google Sheets and Excel
- Teachable
- Honest
- Hard Working
- Willing to sign an NDA for confidentiality

Compensation to be equal to or greater than what is customary for UVU Finance department interns.

This internship has the potential to turn into a part-time job of 10-20 hours a week depending on performance, personality alignment, honesty and work ethic.

Thank you for your consideration,

Clint and Sherry Argyle
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