



## **JSA Financial Planning Internship – Summer 2023**

*We're different; it's just that simple.*

At Jacobson & Schmitt, we're a purpose-driven team of advisors who believe every dollar can positively impact our lives, communities, and environment. We help conscious investors give their money a mission using a highly personalized guidance process, research-based advice, and socially responsible investment strategies.

With this as our mission, our advisors:

- Always place client interests first
- Own the same securities we recommend to clients
- Develop and emphasize intellectual capital, not salesmanship

We are looking for a Financial Planning Intern with a passion for the "craft" of planning and who believes that every client deserves holistic planning and investment management from a fee-only firm that is a fiduciary 100% of the time!

### **Responsibilities will include**

- Help prepare financial plans utilizing Salesforce and MoneyGuidePro
- Develop knowledge of clients' financial/personal situation
- Discuss structured financial plans
- Attend client meetings as the "listener."

### **Requirements**

- Proficiency in Excel
- Must be enrolled in a Certified Financial Planner program as designated by the Board of Certified Financial Planners
- Basic knowledge of developing and managing project work

### **Employment Type**

Full-time between May and August of 2023 with flexible start/end dates; the position will be virtual as needed.

### **Requirements**

- The pursuit of a bachelor's degree; preferably with a concentration in Finance, Accounting, Financial Planning, or Business

Submit your resume & cover letter to: [Adam@jandsadvisors.com](mailto:Adam@jandsadvisors.com)