PETERSON
WEALTH ADVISORS

Financial Planning Internship

ABOUT PETERSON WEALTH ADVISORS

Peterson Wealth Advisors is an established fee-only RIA specializing in the management of retirement assets for clients using our proprietary Perennial Income Model™. This approach matches our clients' current investments with their future income needs, providing them with peace of mind knowing they have an income plan throughout their retirement. We also provide tax planning, estate planning, and various other financial strategies for our clients.

The members of the firm work in a team environment that encourages innovation, learning, a passion to serve their clients, and helping others in the firm grow. This is an ideal opportunity for someone with aspirations to be a client-facing Lead Advisor in the future.

INFORMATION

- Internship starts May 6th and ends August 16th (flexible).
- In-office internship – office is located in Orem, UT, 10 minutes from UVU.
- Monday – Friday, 9 a.m. – 5p.m.
- Full-time intern preferred (30 - 40 hours, though we are flexible with school schedule).

RESPONSIBILITIES

- Work directly with the firm's advisors in serving new and existing clients.
- Participate in client meeting preparation and follow-up, assisting with the client meeting preparation and post-meeting review process. Once trained, you will also have the chance to jump in on client meetings!
- Help create and update financial plans for clients in alignment with their goals and values.
- Work with operations team to learn processes for onboarding clients, client activities, and working with our custodian.
- Data clean-up in our CRM system and investment software.
- Be an active firm member by continuing to build a best-in practice firm focused on clients and helping each other grow. **No business development requirements.**

QUALIFICATIONS

- Enrolled in an accredited College/University as a Junior or Senior, pursuing a bachelor's degree in financial planning, accounting, or related field.
- Minimum GPA of 3.0
- Strong written and verbal communication skills. Accuracy, attention to detail, organized, and strong problem-solving skills.
- A proactive "can do" attitude to do whatever it takes to serve the client. A sincere commitment to the financial planning profession and entrepreneurial mindset.

PERKS

- Paid internship: $20/hour
- Spend time with multiple employees learning all aspects of the company! Marketing, investment management, operations, etc.
- Paid holidays
- Mentorship from founder and many other advisors.
- Miscellaneous: Company Topgolf membership, weekly team lunch, quarterly team activities

INSTRUCTIONS FOR APPLYING

We will hold the first round of interviews from March 28th – April 5th, including the Spring Banquet held on March 28th at Utah Valley University.

Please send resume and cover letter to careers@petersonwealth.com in Word or PDF format.