



## Internship

TFO Phoenix Inc., a wealth management firm located in Phoenix, Arizona, is looking to expand our team. Since our formation in 2011, we have seen growth in both the number of client families we serve and the number of talented employees we need to serve them effectively. We are currently seeking a Wealth Advisor Intern to help us deliver on our goal of helping families by Connecting Wealth and Purpose®.

## Responsibilities

The primary role of the Wealth Advisor Intern is to support the members of our client service teams, including but not limited to the following:

- Preparing financial plans and related financial reports for clients; assisting in the delivery of those plans and identifying key action steps
- Implementing investment portfolios based on the firm's investment philosophy and client's specific goals and objectives
- Attending client meetings; documenting the follow-ups and next steps
- Interacting and developing relationships with clients to understand their financial and personal goals
- Preparing materials and analysis for discussion with clients on other financial topics, such as estate planning, financial literacy and philanthropic strategies
- Preparing tax returns including individual, S-Corporations, partnerships and trust returns

## Qualifications

- Pursuing a Bachelor's of Science in Accounting, Finance or Personal Financial Planning or a Master's degree in a related field
- Minimum GPA of 3.00
- Ability to work well in a fast-paced, team oriented environment
- Excellent communication and listening skills
- Outstanding analytical skills and exceptional attention to detail
- Commitment to professionalism and excellent client service
- General understanding of Microsoft Office applications

TFO Phoenix offers flexible hours to accommodate school schedules. This is a paid internship.

## About TFO Phoenix

TFO Phoenix's mission is *Empowering Families to Succeed by Connecting Wealth and Purpose®*. Our pursuit of this mission is driven by five firm values: Care, Simplify, Help More, Play and Do The Right Thing.

We are committed to providing a challenging, rewarding, and most importantly, fun environment for our team members. We believe creating an enjoyable work environment for our employees allows them to give their best efforts each day to help our clients connect wealth and purpose.

If interested, please email your resume to [careers@tfophoenix.com](mailto:careers@tfophoenix.com).