



Wealth Management Internship

Twice each year we invite one college Junior, Senior or post-grad CFP Certificant to explore the career of wealth management through our unique Protege Program. The intern joins one of our advisory teams and receives technical training, one-on-one mentoring and networking opportunities. They're given challenging and exciting responsibilities and are responsible for leading one key project. It is from our Protege Program that we select our future Paraplanners and Associate Wealth Managers.

The Wealth Management Intern explores a career in wealth management by taking on challenging and exciting responsibilities. The intern participates in strategy sessions, client meetings, and takes the lead responsibility of one key project.

Essential Responsibilities

- Assist in the preparation for client meetings by preparing a high volume of Investment Review books for clients.
- Help prepare financial plans, reviews, reports and client presentations
- Perform investment and other project research
- Input data into financial planning software (eMoney and Morningstar)
- Attend client investment and planning meetings to observe and learn
- Perform stock compliance as needed, verifying trades made are for the client
- Compile and analyze technical analysis using Dorsey Wright Point & Figure methodology
- Attend weekly Financial Planning meetings and bi-monthly Investment team meetings.

Qualifications

- Finance, Business or Marketing major preferred with a minimum GPA of 3.2
- Highly interested in a career in Wealth Management
- Demonstrated track record of initiative
- Strong technology, research and organizational skills
- Enjoys research and analysis
- Confident, poised and professional in appearance
- Capable of taking on creative challenges and tight deadlines

To Apply- Because we offer only two internships each year, we're looking for exceptional candidates. Our entire team participates in the intern selection process. To apply, please email your resume and cover letter to jobs@wjohnsonassociates.com with your full name, followed by "Internship" in the subject line.