



Wealth Management Internship

Twice each year we invite 1-2 college Juniors, Seniors or post-grad CFP Certificants to explore the career of financial planning and 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. 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. It is from our Protege Program that we select our future Paraplanners and Associate Wealth Managers.

Essential Responsibilities

- Assist in the preparation for client meetings by preparing a high volume of Investment Review books for clients, reviewing compliance paperwork, and meeting summaries
- Help prepare financial plans, reviews, reports and client presentations
- Perform investment and other project research
- Input data into financial planning software (eMoney and Morningstar)
- Observe client investment and planning meetings
- Perform stock compliance and trade review, as needed
- Create and analyze performance reports for investment committee meetings
- Compile and research technical analysis using Dorsey Wright Point & Figure methodology
- Attend weekly Financial Planning and Investment team meetings.
- Learn how to identify qualified prospects for business development purposes, as needed

Qualifications

- Finance, Business, Accounting, or Financial Planning major preferred with a minimum GPA of 3.2
- Highly interested in a career in Wealth Management or Financial Planning
- 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@wjohansonassociates.com with your full name, followed by "Internship" in the subject line.