Financial Advisor Career Track Internship

Do you get excited about making investments or helping others with their investments? Do you have excellent interpersonal and leadership skills? If you are passionate about pursuing a career as a personal financial advisor, we invite you to apply for Endowment Wealth Management's 2024 Summer Financial Advisor Career Track Internship.

Personal financial advisors provide advice to help individuals manage their money and plan for their financial future. A career as an advisor has a promising future. Within the next ten years, it is estimated that 37% of financial advisors are expected to retire from the industry. Meanwhile, over the next few decades, parents and grandparents are expected to pass down approximately $84 trillion to charities and the next generation, who will need help and guidance in managing their inheritance.

Endowment Wealth Management® ("EWM") is offering a Financial Advisor Career Track Internship opportunity for summer 2024. The paid position(s) in our corporate headquarters in Appleton, WI, will challenge you to apply your classroom work in a real-world environment, supporting our credentialed, experienced investment advisory and management team. The internship(s) will involve tasks and activities intended to provide you with an opportunity to provide a solid foundation for a financial advisor career, including:

- Gathering information and supporting the development of financial plans
- Client meeting preparation and post-meeting follow-up
- Curating and distributing (through traditional and digital channels, including websites, social media, and client newsletters) relevant personal finance, investments, and economics content
- Use of various financial planning and advisory technology tools, including turnkey asset management and custodial platforms, client-relationship management, financial planning, risk assessment, and performance reporting,
- Understanding of portfolio management and investments, including exchange-traded funds (ETFs), asset allocation, alternative investments, private funds
- The regulatory environment that advisors need to navigate while servicing their clients
- This position will allow you to gain professional work experience in an area related to your degree, learn from other professionals, benefit from a team experience, and cultivate a professional network to help get you started on a career path as a financial planner and advisor.

Responsibilities:

1. Assist financial advisors with client meetings, presentations, marketing, and financial planning sessions.
2. Collaborate with members of our advisory team to develop personalized financial plans for clients.
3. Learn and utilize financial software for client relationship management and performance reporting.
4. Gain exposure to various aspects of the financial services industry, including wealth management, retirement planning, and investment strategies.
5. Participate in training sessions and workshops to enhance your knowledge of the current state of the economy, financial markets, and industry tools.
6. Shadow experienced, credentialed financial advisors to learn best practices and gain insights into client relationship management.
7. Contribute to the development and implementation of marketing initiatives to attract new clients.
8. Assist with information gathering and investment research, economics, personal finance, and other relevant topics.

Requirements for Applicants:

- Currently pursuing a bachelor's or master's degree in finance or a related field and have completed their junior year of coursework with a targeted emphasis on finance, personal finance, investments, economics, entrepreneurship, or a related course of study.
- 3.5 or better GPA
- Proficient in Microsoft Suite Office applications (PowerPoint, Word, Excel, Publisher)
- Excellent interpersonal, written, and verbal communication skills, including writing, editing, and proofreading proficiency.
- Have completed your basic-level finance courses and can demonstrate a basic understanding of general investing concepts and financial industry terminology.
- Availability to work full-time hours during the summer of 2024.
- Self-motivated, enthusiastic, creative, vital planning and organizational skills
- Possess a solid attention to detail and proven ability to multitask and meet deadlines.

The ideal candidate will also:

- Currently reside in Northeast Wisconsin
- Have completed advanced business/finance courses.
- Working towards or considering a career in financial planning, investment advisory, or investment management industry.
- Be seeking to acquire a Certified Financial Planner (CFP) designation

Salary/Benefits

1. Comprehensive training, including valuable insights and mentorship from experienced financial advisors.
2. Exposure to a various financial products, services, and strategies.
3. Hands-on experience in client interactions and financial planning.
4. Networking opportunities with professionals and industry leaders.
5. Valuable insights and mentorship from experienced and credentialed financial advisors.
6. Potential for future employment opportunities

This internship position is for temporary full-time employment from May through August 2024. Possible part-time continuation through the 2024-2025 school year.

Number of openings: 1-2

Pay rate:	$14 per hour
Position Type:	Full time
Weekly Hours:	40
Benefits eligible:	No
Location:	Appleton, WI
Office Schedule:	Monday-Friday 8 AM – 5 PM

Endowment Wealth Management, Inc. is an equal-opportunity employer. Candidates must be authorized to work in the United States and not require work authorization sponsorship by our Company for this position now or in the future.

HOW TO APPLY:

To apply for this internship opportunity, please submit your resume, cover letter, and any relevant academic transcripts to tim@endowmentwm.com. We are excited to review your application and discuss how this internship can be a valuable steppingstone towards a successful career as a financial planner and advisor.

Company Description

EWM and its affiliates are financial services firms headquartered in Appleton WI. We are thought leaders in the investment advisory and investment management business serving families, advisory firms, non-profit, and institutional clients locally, regionally, and nationally within the context of our Endowment Investment Philosophy®. We are co-creators of the Endowment Index® calculated by Nasdaq OMX®.

About EWM

Endowment Wealth Management, Inc. is an independent private wealth management firm whose **sole mission** is to provide wealth sustainability for individuals, families, retirement plans, endowments, foundations, and other institutions. We are valued family wealth advisors to clients throughout the United States because we serve our clients as fee-only fiduciaries, our experienced professional team, and our use of the Endowment Investment Philosophy.

About our Affiliates:

ETF Model Solutions, LLC develops ETF-based investment models within the framework of the Endowment Investment Philosophy. We seek to provide investment solutions to 401(k) plans, other Investment Advisors, Family Offices, Endowments, Foundations, Trusts, and Individual Investors. Embark is our digital solution providing individual investors access to our Endowment Investment Philosophy.

Global Alternatives Investment Management LLC curates opportunistic alternative investment opportunities for high-net worth clients and institutional investors, including private equity and venture capital. Our private funds target co-investments, private equity, and venture capital investments domestically and internationally, including in Europe, Southeast Asia, and Central America. Our investments have targeted companies across multiple industries, including telecommunications, technology, fintech, crypto, transportation, cannabis, defense electronics, medical imaging, retail, and others.