



Traditions Wealth Advisors

Financial Planning Internship

About Us

Independently Aggie-owned and operated, Traditions Wealth Advisors is a holistic financial planning and wealth management firm located in College Station, Texas. We utilize well-known asset custodians such as Fidelity Institutional. We are seeking long-term applicants to begin in May and continue through the school year until the following May. Many of our past interns have secured positions with Fortune 500 companies, Big 4 accounting firms, or launched careers on Wall Street after completing their internships and degrees at Texas A&M University. This internship will equip you with the knowledge and experience to excel in the professional world.

Intern Responsibilities

- Prepare and organize client meeting materials
- Analyze and research financial planning subject areas to aid the CFP and/or CPA with client decisions
- Process client service requests
- Conduct information gathering and digital input process for new clients
- Facilitate implementation of office-wide infrastructure projects (e.g. digitize client information)
- Collaborate with the CFP/CIO and CPA to learn the ins and outs of financial planning
- Work in various software including Redtail CRM, Advyzon, Fidelity Wealthscape, Holistiplan, MoneyGuide Pro and Morningstar or other Investment Research software

Qualifications

- Must be an undergraduate junior, senior or master's student with either financial planning experience or enrollment in a financial planning curriculum (e.g. Texas A&M's Financial Planning)
- Required to have and maintain a 3.0 GPR in finance, financial planning or business field degree major or minor
- Proficiency with Microsoft Excel, Word, and PowerPoint is necessary
- Needs to be organized, efficient and detailed-oriented with a genuine interest in financial planning
- Experience with retirement and insurance planning, MoneyGuidePro, or Morningstar Office is helpful

Internship Details

- Number of Openings: 1
- Workdays / Times: Monday - Friday, 8:30 AM - 5:00 PM
- Hours per Week: 10-15
- Compensation: \$12 per hour + bonuses
- Location: Off-campus, College Station, TX

Visit our website for more information:

traditionswealthadvisors.com/internships

To apply, please email your resume, cover letter, and unofficial transcript to:

Matalyn@traditionswealthadvisors.com