Traditions Wealth Advisors

Financial Planning Internship

Independently owned and operated, Traditions Wealth Advisors is a holistic financial planning and wealth management firm located in College Station, Texas. **Traditions Wealth Advisors utilizes well known asset custodians such as FIDELITY.** We are looking for long-term applicants to start in May and continue through the school year until the following May.

Many of our past interns have signed with Fortune 500 companies, the Big 4 Accounting firms, or gone on to gain careers on Wall Street after completing their internship and degree at TAMU. Our internships provide you with the knowledge and experience you need to be competitive in the real world.

Duties:

- Collaborate with the CFPs to learn the ins and outs of financial planning
- Analyze and research financial planning subject areas to aid the CFPs with client decisions
- Process client service requests
- Conduct information gathering and digital input process for new clients
- Prepare and organize client meeting materials
- Facilitate implementation of office-wide infrastructure projects (e. g. digitize client information)

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 Minor)**
- Required to have and maintain a 3.0 GPR in an economics or business field degree 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, Morningstar Office, Redtail, or NetDocuments is helpful

More Information:

- Number of openings (per position): 1
- Workdays/Times: Monday-Friday/9am-5pm
- Hours per week: 10-15
- Starting Wage/Salary: $8
- Job location: Off campus (in College Station)