Financial Planning Internship

Summary

Learn about all aspects of being a financial advisor: marketing, business development, interacting with clients, sales, servicing accounts and relationship management. Also learn about the HR, CEO, CFO and management functions that go along with owning and operating a small business.

Your Learning Opportunities

Marketing Experience:

- Participate in weekly marketing calls to learn about long-term marketing strategy and current projects for the firm.
- Utilize our firm Social Media to develop targeted introductions from our network of existing relationships.
- Utilize Customer Relationship Management (CRM) data to create opportunity lists for existing clients.
- Interact with clients and prospects at client appreciation events to develop new opportunities for the firm.

Job Shadowing:

- Attend industry and community networking meetings to learn about business development.
- Work alongside our Transition Coordinator to learn about scheduling and making initial contact with referrals to gain an initial appointment, as well as the art of following up. Learn how we make the transition smooth for new clients and learn about interacting with contra-firms (the firm our new client used to work with).
- Work alongside our Financial Advisors, sitting in on potential and existing client meetings to learn how we interact with clients at each stage of the relationship:
  - Introduction meetings (selling prospective clients on the idea of working with our firm)
  - Financial Planning meetings (analyzing their situation and developing recommendations)
  - Wealth Management meetings (implementing products and services to achieve their planning goals)
  - Periodic Review meetings (long-term relationship management and developing referrals from existing clients)
- Work alongside our Service Coordinator to learn about the long-term maintenance of relationships and servicing client needs at a full service financial planning firm.
- Work alongside the Managing and Senior Partners to learn about owning and operating a small business. Learn about and run excel reports we use to track firm activity and firm financials.

Customer Service Interaction:

- Create reports, scan documents and prepare folders for client meetings.
- Learn about communication by talking with existing clients to update CRM data and financial planning details.

Revised: 10-2017

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