Job Title:Student Intern

Status: Part Time (15-30 hours/wk)

Reports To: Jordan Underhill, CFP® Financial Advisor

Underhill Financial Advisors, LLC is an independent boutique transitional wealth planning firm specializing in developing and managing personalized financial plans for our clients. Our team of three advisors and four full-time support staff has been servicing clients in over 31 states for over 27 years. We are proud to be the recipient of the 2015 BBB Torch Award for Business Ethics and to be finalist for the 2015 Chamber of Commerce Best Place to Work Award.

Job Description

The primary responsibility of the Student Intern is to provide Best of Class service to enhance the overall client experience.

The Student Intern will be responsible for implementing business development strategies to enhance loyalty and increase value with our clients resulting in revenue growth from new and existing clients.

Areas of Responsibility

* **Financial Planning Support**
  + **Assist Para-Planner in research of financial planning goals and metrics**
  + **Meeting Prep Assistance**
    - **Data Pulling & Consolidation; Investment Research; Cash Flow Diagnostics**
  + **Uploading Financial Plans into Document Management™ virtual storage application**
  + **Investment Asset Tracking and Client Correspondence**
* **Client Data Management**
  + **Insurance Case Management & Follow Up**
  + **Insurance Data Mining and Reporting**
  + **Ongoing Project Work**

Required Experience & Skills

* Obtaining Bachelor’s Degree; or Associates Degree in Business Administration
* Related experience in Finance/Customer Service/Support/Sales
* Proficient with MS Office Suite, Adobe Professional, and Windows Software
* Ability to analyze client data to initiate and execute on targeted
* Effective verbal and written communication skills

Schedule, Compensation & Benefits

* Schedule | Flexible: Monday - Friday 8:00 am – 5:00 pm
* Hourly Wage Range: | $20.00 / hour