Mark A. Kuhn
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Wealth Management Intern

Position Description

We seek a college junior who aspires to enter the field of wealth management who can support our wealth management team with investment research, financial planning, operations, and client service activities. We create customized wealth management plans for clients that incorporate planning around their goals for retirement, education, estate and philanthropic wishes, and tax optimization. In this position, you will learn how we view the investment world, our approach to building diversified, long-term portfolios, and why we've chosen particular fund managers to fill out each client's portfolio. The position will work closely with the firm's advisors and operations staff to gain broad exposure to the operations of a Registered Investment Advisor.

Duties and Responsibilities

- Create retirement and education planning analyses using eMoney
- Develop portfolio and planning recommendations consistent with client goals
- Prepare materials for client meetings
- Attend client meetings and coordinate action items with operations staff
- Generate trades related to client cash needs, RMDs, and charitable gifts
- Orient yourself to the firm's investment philosophy
- Coordinate and attend update meetings with fund managers
- Track investment performance of manager lineup and provide insight into performance drivers

Required Skills and Education

- Enrolled in a bachelor's degree program from an accredited institution
- Detail oriented
- Client service focused
- Excellent written and verbal communication skills
- Comfortable learning new technologies
- Maintain confidentiality of client information

Hiring Requirements

- Consent to background and credit check
- Proof of COVID-19 vaccination

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