



COMPREHENSIVE WEALTH MANAGEMENT

Internship – Financial Planning

Position Description

Title: Financial Planning Intern
Reports to: Lead Advisor
Benefits: No
Status: Part time; Unpaid
Date: December 11, 2020

[Comprehensive Wealth Management \(CWM\)](#) is looking for a summer internship candidate to help bring real work experience to driven, hardworking student studying finance (or related field) as a Junior or Senior in college. The student will be selected based on professor recommendation(s) and finance/business courses that have been completed. In addition to other coursework, we are specifically interested in candidates who perform well in communication/speech classes.

Internship Summary

The duration of the internship will take place over 8 weeks between the months of June and August on Monday, Wednesday, and Friday, generally from 10am to 5pm. Mondays will be dedicated project and research days, Wednesday and Friday will be days that the candidate will sit in on client meetings, ask questions and learn about the account paperwork and meeting prep.

The intern will learn about the financial planning process, environment, and terminology while completing a financial plan for a hypothetical client. The candidate will then present the final plan, prepared over the 8 weeks, to the lead advisor and other CWM team members.

**This internship is planned to be in-person but may shift in light of COVID.*

Benefits of Internship

The candidate will gain real world experience with the potential for a letter of recommendation/reference and college credit (if applicable). They will leave the internship with a completed plan for a hypothetical client, gain insight into world of wealth management and financial services, and develop greater insight into their own financial situation and future goals/planning.

To Apply

If you're interested in applying, please submit your: 1) Resume, 2) Cover letter, and 3) Letter(s) of Recommendation (optional) via our website at CWMnw.com/Careers. **We will be reviewing candidates in March of 2021.**