



COMPREHENSIVE

WEALTH MANAGEMENT

Position Description

Title: Financial Planning Intern (*In-person*)

Reports to: Lead Advisor

Benefits: No

Status: Part time; Unpaid

Date: Summer 2022

[Comprehensive Wealth Management \(CWM\)](#) is looking for a summer internship candidate to help bring real work experience to a 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 financial services industry is changing and the need for fiduciary financial planning is on the rise. You will learn about the financial planning process, environment, and terminology while completing multiple financial plans for hypothetical and real-life scenarios. There will be an emphasis on professional communication, interpersonal relationships and interacting with clients. You will encounter tools, techniques and strategies used by high-net-worth individuals and how they are applied in real life situations. At the end of the internship, you will present a comprehensive hypothetical financial plan to the lead advisor and other CWM team members.

Duration: This internship will take place over 8 weeks between the months of June and August on Monday, Wednesday, and Friday, generally from 10am to 5pm.

Benefits of Internship

You will gain real world experience with the potential for a letter of recommendation/reference and college credit (if applicable). You will leave the internship with a completed plan for a hypothetical client, gain insight into the world of wealth management and financial services and develop greater insight into your 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. **CWM will be reviewing candidates and scheduling interviews starting in March of 2022.**