

MARKET STREET

WEALTH MANAGEMENT ADVISORS

FINANCIAL PLANNING INTERNSHIP-SUMMER 2019

When Market Street Wealth Management Advisors (Market Street) was founded in 2001, it was created with the guiding principle that its clients would be served in a manner in which its own team and their family members would want to be treated. At Market Street, we've built a team with the best and brightest people to ensure we're on the forefront of market trends while providing sound financial planning recommendations to help our clients achieve their goals. Today, we continue to focus on providing an unmatched client experience through comprehensive financial planning, integrated investment management, and qualified retirement plan consulting services.

FIRM INFORMATION

Market Street Wealth Management Advisors, LLC

3105 E 98th Street, Suite 170

Indianapolis, IN 46280

www.mswma.com

Facebook: [@MarketStreetWealthManagement](https://www.facebook.com/MarketStreetWealthManagement)

Instagram: [@marketstreetwealthmanagement](https://www.instagram.com/marketstreetwealthmanagement)

Twitter: [@marketstreetwma](https://twitter.com/marketstreetwma)

JOB SUMMARY

This internship provides you with the opportunity to learn about the fee-only independent Registered Investment Advisor (RIA) business from the inside. You will experience many facets of our firm's financial planning, investment management, and retirement plan consulting business as well as work on developing financial plans, client reporting, client operations, and contribute to special projects.

We anticipate that you will leave your internship with a strong sense for how a successful RIA firm operates and hopefully with a desire to join this growing profession after graduation.

POSITION DESCRIPTION

Title: Financial Planning Intern

Dates: May 2019 through August 2019

Hours: 7:30 am – 4:00 pm Monday through Friday

DUTIES AND RESPONSIBILITIES

You can expect to gain exposure in the following areas:

- Assist in preparation of financial plans, presentations, and other meeting materials.
- Assist in preparation of meeting follow-up items including reports and Investment Policy Statements.
- Observe Client Meetings in a supporting and learning role.
- Update Client information in our Client Relationship Management (CRM) software.
- Attend Market Street team meetings, as required.
- Assist with special projects.

QUALIFICATIONS

An ideal candidate would possess the following qualifications:

- Currently attending a college or university in a Financial Planning (or similar description) Bachelor's degree program.
- Interested in a career in the independent investment advisory business.
- Strongly considering pursuing the CERTIFIED FINANCIAL PLANNER™ designation.
- Proficiency with Word, PowerPoint, Excel, and Outlook.
- Strong written and verbal communication skills.
- Client-first attitude and passion to serve others.
- Understanding of fiduciary responsibility.
- Ability to multi-task, manage time effectively, and work unsupervised.
- Ability to maintain absolute confidentiality in dealing with client matters.
- Strong analytical skills.
- Self-starter, energetic, assertive, and eager to learn.
- Professional demeanor, team player, excellent people skills.
- Desire to work successfully in a small company environment.

COMPENSATION AND APPLICATION

This is a paid internship; compensation will be discussed during the interview process.

Internship Contact Information

Jessica L. Bokhart, CFP®
Partner | Senior Financial Planner
Phone: 317-860-1085
jessicab@mswma.com
www.mswma.com

Application Process

To apply for this internship position:

- Submit your cover letter, resume, and college transcript to jessicab@mswma.com
- If you are selected from our resume review, you will be contacted to begin the in-person interview process.

**Market Street Wealth Management Advisors, LLC is an Equal
Opportunity Employer**