Hurlow
WEALTH MANAGEMENT GROUP, INC.

FINANCIAL ADVISOR INTERNSHIP

The Hurlow Wealth Management Group financial advisor internship program is designed for college students or recent graduates who are interested in becoming financial advisors. The goal of the program is to expose the interns to job responsibilities that closely replicate those of an entry-level financial advisor, complete with a formal training schedule and performance evaluation. Interns will have daily interaction with our team of financial advisors and will have opportunities to learn from them while assisting with their responsibilities. Depending on the needs of the company, an offer of full-time employment is possible (but not guaranteed) for interns who exceed expectations and exhibit the traits of successful advisors.

Summary of Job Duties

- Prepare for client meetings through analysis of client-specific financial planning topics
- Attend and record minutes of client meetings
- Disseminate post-meeting information and complete related follow-up tasks
- Complete client-specific projects related to retirement planning, investment management, tax reduction, risk management, estate planning, education planning, and more
- Complete research projects on various topics in the financial planning industry
- Execute administrative tasks, including record entry and database maintenance
- Create and save quarterly investment monitoring reports for 401(k) retirement plans
- Classify any undefined or unclassified assets in our investment management software program
- Attend and contribute to weekly team meetings
- Facilitate 401(k) enrollment meetings, as needed

Training Schedule

- Weeks 1-2: Shadow a Financial Advisor
    - View eMoney (CFO Center) training videos
    - Learn how to navigate CFO Center
    - Learn how our client filing system is structured
    - Learn basic meeting prep tasks
    - Learn how to make updates to the CFO Guidebook
    - Learn expectations of recording meeting minutes
    - Learn post-meeting tasks
    - Learn how to run reports on FI-360
- Weeks 3-10: Work independently with supervision by a Financial Advisor
    - Execute the typical duties of Financial Advisor
    - Learn additional irregular tasks, as assigned

Performance Evaluation

- Intern will be evaluated by a Financial Advisor with respect to the following objectives:
    - Completion of training videos
    - Navigation, understanding, and accuracy of entries in the CFO Center
    - Understanding and execution of client meeting prep
    - Accuracy, completeness, and timeliness of meeting notes

    - Understanding and accuracy of entries in the CFO Guidebook
    - Understanding and execution of post-meeting tasks
    - Intangibles: Attitude, communication skills, initiative, and teamwork
- Performance evaluations will be reviewed and approved by a Firm Partner prior to delivery to the Intern

Other

- Interns will be required to sign a confidentiality agreement
- Interns will be provided with company-issued laptops and network access for the duration of employment

Qualifications

- Currently enrolled Junior or Senior in college majoring in economics, accounting, finance, financial planning, mathematics, or other related business degree; or have completed such degree
- GPA of 3.3 or higher preferred
- Strong interest in pursuing a career as a financial advisor
- Excellent leadership, communication, teamwork, and service skills
- Aptitude for financial concepts and products and how they work
- Strong analytical skills with the ability to collect, organize, analyze, and disseminate significant amounts of information with attention to detail and accuracy
- Strong computer skills, specifically advanced knowledge of Microsoft Excel, Microsoft PowerPoint, and other Microsoft Office products
- Intermediate industry knowledge is preferred
- Ability to dedicate at least 24 hours per week to the internship (12 hours per week if full-time student) at our Bloomington or Indianapolis locations

Compensation

- Interns will be paid a minimum of $12.00/hour, consistent with federal and state employment law

Contact Information

- Interested candidates should forward a cover letter, résumé, and unofficial transcript to Gordon Nesbit via email at gnesbit@hurlowwealth.com