Firm Overview

Centura Wealth Advisory is a non-commission, fee-only Securities and Exchange Commission Registered Investment Advisory firm located in San Diego, California. Centura provides Wealth Advisory Services including financial planning, investment management, and legacy planning to affluent and wealthy individuals as well as business entities and non-profit organizations using our Liberated Wealth (SM) process.

We recognize that our strength and success are linked to the quality and skills of our associates. We are proud to be a place where talented people who want to make a difference can grow as professionals, leaders, and as individuals.

We are currently seeking undergraduate or graduate students with an interest in working in a professional business environment to join our team for a Finance Internship. We will provide qualified individuals with outstanding education and growth opportunities. If you are a high energy individual with strong work ethic, excellent team skills, and outstanding communication skills, we would like to speak to you.

Qualitative Requirements

We seek an intern that has a desire to gain professional experience, has a strong work ethic, and is incredibly eager to learn. This person should have exceptional listening skills, excellent verbal and written communication skills, and the ability to follow directions and multitask. This person needs to be inquisitive, resourceful, and not afraid to ask questions. Candidates must also be willing to do whatever job is given to him/her. An intern should live by the mantra, “no job is too big and no job is too small.”

Competencies, knowledge, and skills

- **Integrity / Honesty –** Displays high standards of ethical conduct, understands the impact of violating these standard on the organization, self, and others, chooses an ethical course of action, and is trustworthy. Must be able to maintain confidentiality.
- **Conscientiousness –** Displays a high level of effort and commitment towards performing work and demonstrates responsible behavior.
- **Organization –** Needs to be accurate, highly detail oriented, organized, and able to prioritize time management to perform assigned work.
- **Interpersonal skills –** Shows understanding, friendliness, courtesy, tact, empathy, cooperation, concern, and politeness to others and relates well to different people from various backgrounds and different situations.
- **Communication –** Uses correct English grammar, punctuation, and spelling to organize and communicate ideas in words that are appropriate to listeners and readers and uses appropriate body language.

Required Qualifications

- Enrolled in an accredited public or private undergraduate or graduate CFP affiliated program
- A 3.0 GPA or above
- Majors: Business, Marketing, Sales, Finance, Mathematics
- Microsoft Office skills: Word, Excel, PowerPoint, Outlook, HTML
- Social media skills: LinkedIn, Facebook, YouTube, and more
- Proficient with standard office equipment
- Basic knowledge of financial and investment concepts: stocks, bonds, mutual funds, etc.

Organization Responsibilities

- Provide a positive, supportive learning environment in which the intern may participate in work that directly correlates to their academic major
- Designate a manager that will provide a meaningful orientation regarding the organization's purpose, services, clientele, and operating practices.
- Work constructively and effectively to assist the intern with project management and work efficiency
- Complete evaluations
- Appreciate diversity in all its forms and respect various social and political viewpoints; do not discriminate based on race, creed, color, sex, religion, age, ethnic origin, disability, or sexual orientation.

Intern Responsibilities

- Demonstrate the highest level of professionalism, which includes arriving on time for designated work, notifying the site supervisor of any deviations from the established schedule, and dressing to the standards of the organization and the work being performed. Respect the organization's reporting structure and follows the policies and procedures of the company.
- Communicate effectively with the supervisor and other staff, accept and apply critiques and suggestions to daily work to become more productive and efficient.
- Appreciate diversity in all its forms and respect various social and political viewpoints; do not discriminate based on race, creed, color, sex, religion, age, ethnic origin, disability, or sexual orientation.

<u>Investment Management & Financial Planning Duties</u>

1. Perform research on ETFs, stocks, mutual bonds and other securities using various research services
2. Maintain current and proposed portfolio analytical material and documentation
3. Maintain and update various information regarding recommended investments

4. Identify and collect research materials and data on various alternative investments, organize and present salient strengths and weaknesses; attend webinars
5. Maintain and assist in the organization of client portfolios
6. Prepare and proofread investment management performance reports and client fee calculations
7. Prepare application and transfer paperwork, perform follow up on transfer progress and record progress
8. Prepare custodian paperwork and service forms for various purposes
9. Assist in the development of presentation to clients and potential clients
10. Research insurance company information; ratings
11. Call various companies for information on behalf of clients
12. Prepare the following financial exhibits:
    a. Balance sheet
    b. Cash flow projection
    c. Retirement projection
    d. Estate planning document summary
    e. Life and long term care insurance summaries
13. Assist with Client communication and problems
14. Assist in the identification list of all insurance products: life, LTC, annuity
15. Compile and record all requested contract specifications
16. Prepare 3 year forecast for annuity roll offs

General Office Duties

1. Answer and direct income phone calls
2. Collect incoming mail and deliver outgoing mail
3. Scan and save/file all requested documentation to appropriate location
4. Fax requested service forms to appropriate service provider / log process
5. General photocopying and filing
6. Enter contact information and notes into CRM
7. Assist in organization of documentation and archives

Marketing

1. Assist with maintenance of Company website
    a. Author/prepare blog posts
    b. Draft and proofread content
    c. Engage in Lead Activity Follow up
2. Support social media efforts- draft posts for review
3. Support online outreach initiatives
4. Assist in special event planning

Learn the following software

1. Salesforce
2. Morningstar

3. Orion
4. WinFlex
5. Veo – TD Ameritrade's advisor website
6. Wealth Access
7. Portfolio Center

For More Information see the company online assets:

- www.centurawealth.com
- https://www.linkedin.com/company/centura-wealth-advisory/
- https://www.facebook.com/centurawealth/

Students Interested in applying can send their resume and cover letter to: hiring@centurawealth.com