



KEEN WEALTH ADVISORS

Perceptive. Personalized. Precise.

Keen Wealth Advisors, a growing wealth management firm, is seeking an Intern to assist us in our mission of helping clients achieve their financial goals. This is your chance to play a role in the future success of our fast-growing organization!

INTERN

As a paid intern, you will work directly with our internal teams gaining hands-on experience in the financial services industry.

JOB DUTIES MAY INCLUDE

- Recording notes for prospect/client calls and meetings
- Preparing for client meetings
- Updating financial plans for clients
- Marketing and email campaigns
- Respond to basic client service requests
- Client onboarding
- Perform other duties as assigned

KNOWLEDGE, SKILLS & ABILITIES

- Positive attitude
- Strategic thinker
- Strong communication skills
- Ability to multi-task
- Solid technical skills

REQUIRED EXPERIENCE/QUALIFICATIONS

- Currently pursuing a bachelor's or master's degree at a university

We offer a great working environment in a beautiful and professional office located in Overland Park. Our culture is fast-paced, motivational, and focused on improving our clients' lives.

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Main 913-624-1841 | Fax 913-701-3070 | www.KeenWealthAdvisors.com