

Financial Planning Intern

Location: Waco, TX or Temple, TX (Open to Hybrid/Remote)

Job Type: Internship

Reports To: Lead Advisor

Firm: ClearVista Financial

Purpose of the Role

The intern position is designed for students in their junior or senior year in an undergraduate or master's program who desire to gain supervised practical experience in their field of study.

Key Responsibilities

- Manage due diligence initiatives, including full strategy review for financial plans.
- Perform investment, economic, and market research for modeling, including factor studies.
- Research and write internal financial planning reports.
- Assist in the development of presentations and reports as assigned.
- Observes operational and business activities to gain insight into the inner workings of the different functions within each department.
- Provide general support to the team which, may include tasks such as database entry and maintenance, document management, scanning, filing, and other tasks as assigned.
- Maintains the highest Compliance standards by adhering to the company's Human Resources policies, Compliance policies and procedures, professional designation standards, and industry's regulatory standards to mitigate risk to the firm.

Ideal Candidate Profile

- Knowledge of the investments and financial planning landscape.
- Basic theoretical and practical understanding of company investment philosophy.
- Strong communication skills, both verbal and written.
- Strong proficiency in Microsoft Office.
- Proven technical, analytical, and problem-solving skills.
- Ability to handle confidential information with professionalism and maturity.

As a small company, our employees wear many hats and take on a variety of roles. Our ideal candidate will thrive in this environment and enjoy taking on various responsibilities and learning about many different aspects of the business.

Qualifications

Qualified applicants will be working toward a graduate degree, MBA, or an undergraduate degree in their junior or senior year. Open to majors in Business Administration & Management, Finance & Financial Management, Retail & Hospitality Administration, Marketing, Sales, Economics, Accounting, Actuarial/Risk Analysis, Business Analytics, Consulting, Entrepreneurship, Human Resources Operations Management, Real Estate, Sport Business & Marketing, Supply Chain Management, Agriculture Business, Insurance, International Business, Management Science, Non-Profit Management or related field of study.

Compensation and Benefits

This is a paid position working approximately 10-20 hours per week.

This is a one-semester or summer internship position with the potential for extension based on exceptional performance and mutual agreement.

How to Apply

To apply, please submit your resume and a short cover letter expressing your interest and alignment with the firm's values to info@clearvistafinancial.com