Financial Planning Associate-Intern

McGill Junge Wealth Management, a rapidly growing financial planning and advisory firm based in Des Moines Iowa is looking to hire an Associate-Intern. This individual will have the opportunity to grow and be a part of a national wealth management team that delivers customized wealth management and investment strategies, complex financial planning, and retirement income distribution strategies for our clients. The Associate-Intern will have access to training opportunities structured to enhance their business acumen while further developing their professional and technical skills We serve emerging affluent, high net-worth and ultra-high net-worth individuals, families, and business clients.

Role Profile Summary

The Associate-Intern will be responsible for assisting with a wide variety of the financial planning and investment management services we provide for our clients. In collaboration with our Lead Advisors, Director of Investments, Director of Planning and other team members, this individual will focus on supporting various roles such as building and updating comprehensive financial plans, investment operations, insurance operations, client service relationship management, responding to client service requests, and preparing for client presentations and review meetings. This role supports preparation of reports for planning and advisory review meetings and supports maintenance of client records. The Associate-Intern will have the ability to rotate through the various responsibilities of the Investment and Planning Associate as well as interact with Advisors throughout the internship

General Support

- Supports senior team members by helping prepare materials needed for client meetings and follow-ups
- Develops knowledge in comprehensive wealth management

Analytical Support

- Supports client service requests between investments, planning, and insurance teams
- Analyzes client information and prepares reports and presentations under direction of Client Service Associate/Client Service Advisor/Investment and Insurance Operations Associate
- Enters client information into various systems including Planning Experience (PX), NetX360, ENV2, Illustrations, and CRM
- Supports preparation of draft financial plans, investment audits, and insurance illustrations under direction of Client Service Associate/Client Service Advisor/Investment and Insurance Operations Associate

Client Service:

- Supports client service requests and follow up tasks
- Support maintenance of client information in CRM system
- Prepares and delivers investment and insurance paperwork under direction of Client Service Associate/Client Service Advisor/Investment and Insurance Operations Associate
- Attend a variety of virtual client meetings

Team Responsibilities:

- Be a great and approachable teammate
- Participate in all team meetings
- Collaborate with and assist Client Service Associate/Client Service Advisor/Investment and Insurance Operations

Firm Responsibilities:

- Understand and support the firm's vision, mission, and strategy
- Engage in teamwork and team building and integrate into the culture of the firm
- Participate in the completion of strategic initiatives and projects

Qualifications:

- Pursuing Bachelor's degree with major in finance, economics, accounting, financial planning, or related field required (Junior or Senior status preferred)
- Highly motivated individual with a passion for client service, an interest in financial advising/wealth management and a desire to obtain and pass the FINRA SIE, Series 7 and series 63 exams
- A well-rounded academic background with an interest in providing exceptional client service and support

Key Characteristics:

- Integrity and Trustworthiness. These are a cornerstone of MJWM
- Passion and highly motivated self-starter
- Desire for personal development
- Strong critical thinking and problem-solving skills required
- Strong attention to detail with the ability to work with a high degree of accuracy
- Ability to embrace change and work in a fast-paced environment
- Able to work both independently and in a team
- Ability to maintain confidentiality
- Strong written and verbal communication skills, a can-do-attitude, enthusiasm, and a strong aptitude for learning
- The ability to effectively prioritize workloads and complete tasks within well-defined guidelines and time constraints is essential
- Strong organizational skills and attention to detail are critical given the nature of paperwork, processes, and work, upon which both clients and the Wealth Management Team depend
- Strong analytical thinking skills with the ability to draw on a range of resources
- Microsoft Office proficiency
- Excellent customer service

Please submit resumes (with cover letters) to gina.cunningham@nm.com .