



## Associate Advisor **INTERNSHIP GUIDE**



Part of Securities America's Business Mastery Series

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## Introduction

The investment advice industry is facing a critical shortage of new professionals as traditional advisor training programs at wirehouses and captive insurance agencies were decimated in the aftermath of the economic meltdown. With a rapidly aging advisor workforce and no traditional programs to train young advisors, having an internship program in your practice to train and launch promising young candidates is one way to reverse the trend and proactively bring new talent into the industry and your business.

## Create an Internship Program in Your Practice

College internship programs are a cost-effective method for finding key talent, especially for small-business owners, yet the investment advisory industry has not fully embraced internships as a source of finding talent. According to the InvestmentNews/Moss Adams 2011 Advisor Compensation & Staffing Study, just 43 percent of firms surveyed employed college interns.

View an internship program as a long-term strategy with the goal of hiring the intern (or multiple interns over several years) for a full-time position upon graduation. Having this long-term strategy will make the time and effort to launch your program well worth it. This is a perfect win-win situation: The intern gets to try out the firm, and the firm gets to try out the intern without making a full-time hiring commitment. It provides you valuable support and provides high potential college students valuable experience that can help them launch their financial services career. Creating an internship program does not have to be difficult, but it does take some thought before approaching a local college or university.

## Determine Your Program Objective

Before you can begin the process of hiring an intern to help you in your practice, first determine the overall objective for your program:

- Are you looking to bring in an intern to work on special projects or general financial planning preparation in return for teaching them the financial services industry?
- Are you looking to bring in an intern to work with you on creating financial plans and creating investment strategies with the goal of hiring them as a full-time associate advisor at the end of the internship period?
- Are you looking to bring in an intern to support administrative and marketing staff while indirectly learning the financial services business?

*« Research your state's resources. Some states offer grants and tax credits for hiring interns, and some states have centralized portals for advertising internship opportunities. »*

Being clear with your objectives allows you to work collaboratively with your local school's internship coordinator to find candidates who meet your needs.

## Who should I look for?

"Financial advisor" ranks as one of the top 10 most popular career interests among college students surveyed in the 2012 CNNMoney/PayScale.com's list of great careers, and 28 percent of all business majors expressed an interest in becoming an advisor<sup>1</sup>. With this high degree of interest in the profession, you should have plenty of candidates for an internship opportunity with your firm.

If you are looking for an intern for special projects and general financial planning assistance, you should look primarily for a first semester college junior or senior with a strong interest in the financial services industry. These students have weathered the first two years of college life and are well on their way to completing their degree. Second semester seniors are often less successful interns, as their time is consumed with the stress of finishing their degree, landing a full-time job as soon as possible, along with moving back home or somewhere unknown after graduation.

If your goal is to possibly hire the intern as an associate advisor at the end of the internship period, you should look for an MBA or a Financial Planning Certificate program candidate. An MBA/FP certificate student will typically be older, more mature and may often have a previous career that lends to the credibility needed to be successful in this industry.

## Should I pay an intern?

The Fair Labor Standards Act (FLSA), which can be found at [www.dol.gov](http://www.dol.gov), defines the term "employ" very broadly as including to "suffer or permit to work." Covered and non-exempt individuals who are "suffered or permitted" to work must be compensated under the law for the services they perform for an employer. Internships in the for-profit private sector will most often be viewed as employment and must pay at least the minimum wage and overtime compensation for hours worked over 40 in a workweek, even if the person earns college credit for the experience.

The criteria the Department of Labor (DOL) lays out for not paying an intern is counterintuitive to the reasons for bringing in an intern – to have them help you and for you to derive benefit from their work. **If you are benefiting in any way from the work performed by interns, they need to be paid.** Most colleges specifically outline in their internship guidelines that the intern must be paid at least minimum wage. We generally see advisors paying interns in the \$8 - \$17 an hour range depending mostly on local wage rates and year of study. MBA/FP certificate students in larger metropolitan areas will often be paid at the higher end of the range.

*« Another reason to pay your interns - you will get the best, most committed interns who will make the largest and most positive contribution to your practice. »*

*Eighty-eight percent of firms surveyed in the InvestmentNews/Moss Adams 2011 Compensation Study paid interns an average hourly rate of \$13.50.*

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<sup>1</sup> Survey conducted by Harris Interactive May 14-23, 2013, among 500 college students.

## Establish an Internship Timeline

Advisors generally offer internships either on a school-year basis or as a summer program. You will need to determine what is best for you and your practice. If choosing a school-year internship, we recommend hiring for two semesters, from August to May. This gives you a specific level of support for an extended period of time and corresponds with the intern's school schedule. List the internship for one semester, and during the interview process, explore whether the candidate would be interested in working for the second semester. This allows for you to end the internship at the end of the first semester if the intern is not contributing as expected. The typical work schedule is two to four hours per day with a maximum 20 hours per week. Be prepared for some flexibility to accommodate the intern's class schedule but, if the intern's class schedule and your schedule don't match up fairly well, you may consider ruling out that candidate.

The summer internship approach works well for many advisors as the pace of the office is often slower in the summer, allowing you and your full-time staff the time to train and mentor an intern. Advisors who have tax practices report that having an intern from January to May can be distracting and doesn't lend to a valuable learning experience for the student. Summer internships with their short duration are perfect for special project assignments. See the *What Tasks Should I Assign* section for more information on possible special project assignments.

*« Advisors who offer medical insurance: Be sure to understand how the provisions of the Affordable Care Act apply to you and the number of hours your intern works. Contact your health insurance provider or broker for interpretation of current rules. »*

## Consider Offering a Scholarship

If the objective of your internship program is to find a full-time hire, you may want to consider offering a scholarship in addition to the hourly paid rate. This may make sense for you if you are an alumnus of the college or university, if you want to raise your firm's public relations profile in the community or if you want to attract the best candidates to work at your firm. We recommend offering a scholarship to MBA or graduate students. Offering a scholarship to bachelor degree candidates will yield an overwhelming response, with many applicants not interested in financial services career.

You can offer a scholarship from as little as \$500 to as high as \$5,000 with a reasonable amount being around \$3,000. Have your college or university design and administer the nomination and selection process for you.

Once your scholarship is awarded, send a press release to the local media and your clients with the details of your scholarship and biography of your scholarship winner.

### Press Release Example:

LA VISTA, Neb. – Feb. 26, 2014 – Spectrum Financial has awarded the Spectrum Financial Scholarship for a master's in business administration to Dalton Bloomquist. Bloomquist graduated from the University of Nebraska-Omaha (UNO) with a bachelor's degree in business administration and economics. During his time at UNO, he made the chancellor's list five times and the dean's list nine times; participated as a member of Omicron Delta Epsilon International Honors Society for Economics and Phi Eta Sigma National Honor Society; and was named the Arts and Sciences Outstanding Economics Student and the Department of Economics Outstanding Economics Major for 2007-2008 before graduating summa cum laude. Bloomquist said following a business education from the University of Nebraska-Omaha, he plans to pursue a career as a financial planner.



"I am honored to be the recipient of this year's Spectrum Financial scholarship," Bloomquist said. "I look forward to working with everyone at Spectrum Financial during my internship, and I am very grateful to have been selected as this year's winner. With this opportunity I will be able to learn a great deal about the back end of the financial industry and expand my practical financial planning knowledge."

The annual Spectrum Financial scholarship, started in 2005, provides a \$3,000 cash award and the opportunity to participate in an internship with the company. Selection is based on grade point average, with a 3.0 minimum, leadership skills, verbal communication skills and accomplishments through undergraduate training and other experiences.

### **About Spectrum Financial**

Headquartered in La Vista, Neb., Spectrum Financial is an independent financial planning firm established in 1973. Spectrum's mission is to create and manage comprehensive financial plans designed to help clients move toward financial freedom. Spectrum Financial is an SEC-Registered Investment Advisory firm that offers investment management, financial advice and financial planning through a team of financial and insurance consultants and strategic alliances with accountants, estate planners and attorneys.

## **What tasks should I assign to an intern?**

To attract top students, have a meaningful role for them. Interns can help to free up capacity so employees can focus on other important roles and responsibilities. The most common intern duties, according to the InvestmentNews/2011 Moss Adams study, included clerical work (75%) and data gathering (66%), but advisors also involved them in preparing for client meetings (48%) and reporting (30%).

Start by outlining a set of meaningful tasks for the intern to perform that meet the needs of your practice and the requirements of the college or university. Next, craft these tasks into a job description and an educational plan to help you promote your internship through your local school's career center or internship coordinator. Many advisors describe the internship role as the opportunity to work as an "advisor's assistant."

Interns can and should do administrative tasks like filing, copying and scanning, but keep in mind this is an educational endeavor for them. Interns are looking for responsibilities they can include on their resume. You are obligated to involve them in professional tasks where they can gain real-world professional knowledge and experience in this industry. Shadowing provides interns a glimpse into the everyday workings of the financial services profession, so be sure to include time for shadowing from both the client service and advisor points of view.

After your intern has shadowed client meetings, have your intern conduct several mini client interviews on their own. Help your intern develop a script and short set of discovery questions that are non-financial and relationship-oriented to use in the interviews. Gain permission in advance from several easy-to-work-with clients with varying lengths of tenure in your practice. Assure your clients that their confidentiality is first and foremost, and that the goal is truly educational in nature for the intern. By participating in the practice interview, they will be helping the intern determine if pursuing a career in financial services would be a good fit. We recommend limiting the interview to approximately 15-20 minutes, and conducting it at the beginning of a scheduled review meeting. Debrief after each client interview to make the interaction as meaningful as possible and to solidify what was learned.

Special projects are the resume-builders interns crave. Assigning special projects to an intern can help grow your business and potentially pay for the internship. If possible, design your special projects with an identify, notify and follow-up process that your intern can easily describe in a future job interview.

Examples of special projects that use an identify, notify and follow-up process include:

- Research clients who have 529 plans and determine those clients who haven't increased contributions in past two years. Work with the senior advisor to send an approved client letter to selected clients, use an approved script to schedule follow-up calls and set review appointments for the senior advisor.
- Research clients who are making less than the maximum contribution to their IRA accounts. Work with the senior advisor to send an approved client letter to selected clients, use an approved script to schedule follow-up calls and set review appointments for the senior advisor.
- Research clients who turn 70½ in the following year. Work with the senior advisor to send an approved client letter to selected clients, use an approved script to schedule follow-up calls and set review appointments for the senior advisor.

*« Work with your staff to identify a list of special projects before bringing an intern into the practice. »*

Advisors who have hired interns report that college students are generally tech savvy, well versed in understanding website marketing and can easily utilize social media – things many veteran advisors have not kept up with. Although these are not generally described as having an identify, notify and follow-up process, tie overall firm goals to the project in a meaningful way so again, your intern will be able to easily describe their activities and impact on the practice in a future job interview.

*« Marketing majors make great interns for refreshing websites, getting started on social media or handling marketing campaigns. »*

**These are the types of tasks or projects advisors most often ask interns to perform:**

- Investment research, run analysis reports on funds and ETFs, prepare sample portfolios
- Inputting data for senior advisor to prepare initial financial plans or investment recommendations:
  - Review and interpret financial statements and perform numerical calculations, run hypothetical illustrations
  - Preparing quarterly performance reports
- Shadowing client meetings
- Scheduling client review meetings
- Follow-up tasks including calls to clients for information or signed documents
- Helping full-time staff as needed with investment and account paperwork

- Marketing activities:
  - Support upcoming seminar/workshop, call clients to confirm attendance, put together client packets, sign-in sheets, name tags
  - Design letters and forms, postcards, website ads, presentations, etc.
  - Coordinating marketing logistics
  - Assist with conducting a client survey
  - Research, update leads
- Special projects:
  - Sales-generating projects that follow an Identify, Notify and Follow-up Process
  - Update firm's website
  - Research and implement technology to increase productivity such as cloud solutions, mobile and smart phone apps
  - Research and implement Customer Relationship Management (CRM) system
  - Research and implement technology solution to move toward paperless office
  - Research and implement an automated marketing campaign system
  - Start or expand social media marketing
- Scanning and filing on a limited basis
- Greeting clients

*« Keep in mind the length of time your intern will be working in your office when determining which tasks to assign. »*

Tasks you would like an intern to perform:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

*« In the interview process you may uncover a unique skill or talent the intern possesses that may be useful to the firm. Be sure to make use of your selected intern's strengths. »*

## Create a Job Description

To prepare for advertising your internship, create a detailed job description outlining the tasks and responsibilities. The ads should include where to send the resume and a cover letter, which will help you assess their writing skills.

### Internship Job Description Sample:

[Insert a brief description of your firm]. This internship provides the opportunity to learn hands-on how a small independent financial planning firm operates, specifically how financial services including financial plans, investment advice and money management services are delivered



to clients. You will assist the financial advisor in gathering, reviewing and analyzing data, and preparing financial plans for clients. You will also learn client operations and contribute to special projects. This is a paid internship with a flexible schedule. A commitment of 15- 20 hours per week is required.

#### **Learning Activities Include:**

- Case Analysis
  - Review and interpret financial statements
  - Perform numerical calculations, enter data into applicable software
  - Run hypothetical illustrations
  - Assist in preparation of client review meeting reports
  - Prepare charts, graphs, tables and other visual aids to be used in implementation meetings
- Client Service
  - Contact clients or prospects to confirm or schedule follow-up appointments, gather additional information as needed
  - Shadow client meeting with lead advisor
  - Maintain client relationship management (CRM) system
  - Complete client forms, maintain files and records
  - Special Projects
    - Identify clients by specific criteria, send targeted letters and contact clients to set up review meeting
    - Assist with seminars and client appreciation events

#### **Preferred Knowledge and Competencies:**

1. Detail oriented, strong math and analytical skills
2. Good organization and time management skills
3. Strong PC and software skills including Word, Excel and PowerPoint
4. Familiarity with financial planning concepts preferred
5. Good interpersonal, oral and written communications skills

#### **Who Should Apply:**

- Students beginning their junior or senior college year with a minimum GPA of 3.0 in the following fields: Business Finance, Accounting, Economics, Financial Planning and those who want to deepen their understanding of the financial services industry and the financial planning profession.
- Students who demonstrate a drive to succeed and have a strong interest in pursuing a career as a financial advisor and CERTIFIED FINANCIAL PLANNER™ designation after graduation.
- Students with excellent leadership, communication, teamwork and service skills.

- Student must be able to work in the United States and must successfully pass a background check.
- Selected intern will be expected to consistently follow high standards of business and professional ethics when dealing with others and/or performing work activities. Interns are required to follow legal and regulatory requirements and company policies while dealing with clients or performing work activities.

To apply send your resume, a cover letter stating three reasons why you feel you would be the best candidate for this position and three non-professor or family references to: ABC Wealth Management, 135 Ames, Omaha, NE 68128.

## Create an Educational Plan

To prepare for meeting with your local university or college's career center or internship coordinator, create a detailed educational plan describing the learning objectives your internship will provide.

### Internship Educational Plan Sample:

The purpose of the [firm name] internship is to provide the opportunity to apply, through practical experience, the knowledge and skills acquired in financial planning academic courses. Interns will apply financial investment concepts learned through the creation of financial plans and investment recommendations, observation of client implementation meetings and research of investment solutions specific to client needs and goals. The internship offers a holistic view of how a small financial planning business operates, including marketing, client services, back-office operations, compliance and business management. Interns will acquire skills that can't be learned strictly from the classroom, such as strong communication and client service skills. Our business is about people and helping them during life's many transitions, making those soft skills just as important as information learned through coursework.

### Learning Objectives and Activities:

- Discover the knowledge, skills and abilities required to own and effectively run a small business
- Discover the knowledge and skills required for an entry-level financial planner
- Gain understanding of client discovery process to determine client needs and goals
- Gain understanding of financial planning strategies based on client needs and goals
- Gain understanding of the compliance requirements of the profession
- Gain understanding of the communication and sales skills needed to be successful
- Gain practical experience in trading support
- Gain practical experience in client service and back-office operations
- Gain practical experience in portfolio construction and financial planning
- Gain practical experience in business development (obtaining new clients)

- Gain practical experience in marketing a financial services practice including:
  - Traditional marketing
  - Social media marketing
- Gain practical experience in creating efficiency through constant process improvement for a financial services practice
- Gain practical experience in creating efficiency through technology

This is a paid position available for up to 20 hours per week. Interns are expected to adhere to the highest standards of professional conduct when interacting with the firm's clients, prospects and partners. The internship period runs August 1 – May 1, 20xx.

## Advertising Your Internship

### Build Relationships with Colleges or Universities

Developing relationships with career counselors and internship coordinators at colleges will help promote your internship program and help you find out what college students are looking for in an internship experience. If possible, recruit from one of the programs registered with the CERTIFIED FINANCIAL PLANNER™ Board of Standards Inc., as these programs specifically train students for careers in the advisory industry and have recruiting programs to help connect firms with students. Career center representatives and internship coordinators will gladly agree to meet with you. Be prepared with the items previously discussed in this guide:

- Educational Plan – learning benefits to the student
- Job Description – meaningful tasks the student will be engaged in
- Wage – this is a paid internship
- Timeline – expectations for timing and length of internship relationship

Approach your selected college or university approximately 8-12 weeks before you want your internship program to start. To increase your exposure to top candidates make an effort to get to know the faculty, alumni organizations and other appropriate student organizations. By having a strong internship program in place, students will report back to their professors what they learned, and in turn professors will start to recommend your internship to their best students.

Business majors will likely be the most familiar with the possibility of a career in financial services, while other majors will likely know very little. Be open to and make an effort to secure speaking opportunities with students enrolled in a variety of majors about the profession. Reaching out to high potential students early in their education quest may pique their interest to learn if it's a potential career option for them. Depending on the size of your firm and size of the college or university, you may even consider attending their career fairs. Engage students about the profession in general and then specifically address that the internship at your firm is only for students who want to pursue financial services as a career. This way you are promoting your firm but are clear on who should apply for your internship.

If you are partnering with an MBA or Financial Planning certificate program, work with faculty to offer real-life client situations as case studies for financial planning classes – all identifying information kept confidential, of course. This will create additional opportunities for you to get in front of students.

### **Use Social Media**

Post your internship opportunity on your own website. Students and young professionals are generally very social-media driven, so promote the opportunity on LinkedIn, Facebook and Twitter.

*« Find out what the college or university requirements are for the internship. Some programs require students to keep a daily journal, create a folder or build a portfolio of the projects they worked on. In some cases you may need to sign off that the intern worked the required hours as outlined in the program, and in special cases you may have an after-internship interview with the lead professor. »*

### **Your Centers of Influence**

Almost everyone knows someone looking for a job, so promote your internship with your centers of influence including your professional alliance partners, clients, staff, family and friends.

## **Interviewing Candidates**

You will likely receive many resumes to review after your internship opportunity is posted. Work with your career center representative or internship coordinator to determine who will conduct the initial screening of resumes. Screening out non-financial career seekers will save you time and frustration, so be very clear if you are not the person conducting the initial review that you are interested in interviewing only candidates seeking a career in the financial services industry post graduation.

Interviewing internship candidates is a little different than interviewing for a full-time position. Be prepared for your interviewees to be nervous during the interview process. Focus your questions on learning what their career aspirations are versus asking them about various work experiences, as many will have experience only in jobs or industries that are unrelated to their future career goals. That is not to say that experiences working in retail, restaurants and fast food didn't provide an education in customer service, as most likely they did. Your focus is to find out what they are passionate about and what about working in the financial services profession is important to them.

#### **Interview Questions Include:**

- Why did you choose your major or area of study?
- What activities are you involved in outside of school?
- What are your favorite classes and why?
- What has been the most challenging part of your education?
- How would you assess your writing and communication skills? Computer/tech skills?

- Have you had previous internship experience? When, where, what tasks?
- Why are you interested in this internship? In this industry?
- What do you want to learn from this internship? What do you want to get out of this internship?
- What qualities do you think will make you successful in this internship?
- How do you think this internship experience will prepare you for your career?
- What are your career goals? Where do you see yourself in the next five years?

#### Work Ethic/Habits Questions:

- If you could have the perfect work day and you were in control, what would your day look like?
- If you could plan the world's best weekend, what would it be?
- In reference to jobs on their resume: What did you learn while you were at...? What was the best part of the job? What was the worst part of the job?
- Did you have a job or create your own business as a teenager?  
(screens for entrepreneurialism)

During the interview process, be sure to provide realistic expectations that this is a job where the team will count on them to be there every day, dressed appropriately, with the mindset of making no mistakes and the conviction to adhere to a code of confidentiality in regard to the firm's clients and operations. If your dress code is business professional, you will need to state that dress shirt and tie are required, no jeans, no yoga pants, no tennis shoes, no flip flops and no casual Fridays.

Explain in detail what the expectation of no mistakes means in a financial services firm. If a student receives 90 percent on a test, that's great – but that translates into a real-world error rate of 10 percent. A 10 percent error rate in a financial services firm would mean that the wrong box was checked on a form, which translates into the wrong investment being selected for the client, which could cost the firm a substantial amount of money to correct and the possibility of being sued by the client. Advisors will often go so far as to say something like, "every 'i' must be dotted and every 't' must be crossed, so don't take the internship if you are not committed to working as if it were your full-time job." If you don't state your expectations up front, you will most likely be disappointed.

*« In the interview, be sure to describe your background check process and ask candidates if they have any pending issues you should be aware of. »*

Interviews can be held at your office or on the college or university campus, depending mainly on the services and facilities available. Some colleges and universities have a dedicated career center with interview rooms and the ability for the career center representative or internship coordinator to handle all of the logistics of setting up the interview times and location for you. The other option is to simply hold the interview in your office. The benefit of holding the interview at your office is that you provide the candidate with a professional interview experience and your staff can interact with the candidate prior to the interview and provide their initial feedback as well.

Be prepared to sell the benefits of working for your firm, especially to MBA candidates as they may be considering other internship opportunities. The benefits of working at your firm likely include:

- The ability to observe and interact with the owner and decision maker versus a manager in a larger firm.
- The ability to learn how to craft unbiased financial solutions for a mass affluent market, the type of clients early career financial planners usually work with.
- The ability to see all the functions of running a small business.
- (Your Benefits) \_\_\_\_\_
- (Your Benefits) \_\_\_\_\_

## On-Boarding Your Intern

### Hiring Paperwork

Hiring an intern is no different than hiring a full or part-time staff member. Follow your standard new employee on-boarding process including completing a background check and once hired, the W-4, I-9, fingerprint cards and associated persons licensing kit. Add your new intern to your standard payroll process following all state and federal guidelines. Be sure to create a confidential employee file to hold all of these documents and place it in a secure location.

### Training and Mentoring

Many seasoned advisors underestimate the amount of "teaching" time they will need to devote to their interns, so create a repeatable, formal training plan for introducing the series of tasks along with time needed from you to mentor the intern. An intern's schedule will likely be limited to less than 20 hours a week and may require some juggling of your schedule to allow quality time for training and mentoring. If you have a seasoned office assistant or manager, some of the training duties can be delegated to them, relieving some of the responsibility from your shoulders.

As much as possible, treat your interns as if they were full-time employees in regard to their on-the-job training. Being successful in the financial services arena is very difficult, and part of your role is to provide your intern with a realistic career preview. Some tips for getting your new intern up and running:

1. Meet well in advance of your intern starting with your staff to determine which projects would be most valuable for the intern to work on as well as expectations and responsibilities. Keep in mind the length of the internship when determining potential projects. If only a summer internship, designate one primary project and then enhance the internship experience with projects they can assist other staff members or advisors with. Also discuss your expectations for your staff's involvement in the internship process.
2. Create an internship handbook similar to your organization's employee manual. Include guidelines and procedures to familiarize them with your communication processes. Outline the learning objectives and set measurable goals for the intern and your organization.



3. Provide your intern with a warm introduction to your organization. Remember this may be their first time working in an office environment. Communicate necessary policies (i.e. work hours, dress code, safety, etc.). Acquaint them to their work space and environment by conducting an office tour and introducing them to co-workers. Assigning a new-hire checklist is one way to familiarize them with the team. Whenever possible, try to include the intern in organization events such as staff meetings and allow opportunities for networking.
4. Create a repeatable training program, as you likely will have more than one intern. It should be similar to on-boarding a new employee but the depth of training can be paired back. Pairing your intern with a full-time employee ensures the intern has someone to guide and lead them at all times and it gives your full-time staff member leadership experience they will benefit from.
5. Keep in mind that the intern should be assigned meaningful projects and activities. Students are looking for real-world financial services experience, not filing and scanning experience. If you have a repetitive or less interesting project you think an intern can do, you both will be better served to hire a temporary employee from a staffing service instead.
6. Be prepared to mentor your intern. Offer consistent feedback throughout the internship, and provide students with ample opportunity to ask questions. At minimum, make time to work with your intern in the following ways:
  - Assist your intern in preparing a Learning or Individual Development Plan to create a vision for what is to be learned over the course of the internship.
  - Assess your intern's readiness to complete activities, tasks and learning goals. Interns will be able to perform some activities easily while other activities may be more difficult for them. You'll need to assess your intern's ability on each task to determine how to adapt your leadership and coaching styles to meet their needs. As the adage goes "different stokes for different folks (or circumstances)." The "sink or swim" method may work, but it can be highly inefficient and not very motivational.
  - Debrief at the end of each day during the first few weeks of the internship to make sure the intern gets started on the right foot.
    - Hold bi-weekly progress review meetings. Weekly goals should focus on the necessary learning activities to help the intern complete the activities set forth in the Learning or Individual Development Plan. Weekly metrics may seem tedious in the beginning, but as repeated actions become habits over time, so will the setting and recording of measurements.

## **Conduct an Exit Interview**

Provide an exit interview at the end of the internship to gauge their interest in the financial services profession at the beginning of the program and what it is now. Ask questions around how they felt about the experience and how they felt it could have been more valuable so you can improve the experience for your next intern. Also ask the intern for their feedback on where they thought improvements may be needed in the firm. Ask what they thought about the look and feel of the office, workflow, communication and structure. Your intern was a fresh set of eyes in the office, so take the time to ask them what stood out both positively and negatively.

## In Closing

Giving students exposure to the industry through an internship is a great way for an advisor and a firm to give back to the industry and find future high-potential employees. Implementing an internship program into your practice is a great way to gain additional support at a low cost while providing a high-potential college student with a tremendous learning experience that may help them decide if a career in financial services is right for them. Having real-world work experience is an important part of career development and building one's resume. Creating a successful internship program takes effort to set-up but the reward in the possibility of the intern becoming a full-time staff member or junior advisor after graduation is extremely valuable for all parties.

Be realistic in your expectations for what the intern can accomplish and the time you need to devote to an intern in terms of training and mentoring. As one advisor put it, "Only do it if you feel you can be fair to your intern and to yourself." Not every intern will work out, but with set realistic expectations, you and your intern could benefit tremendously.

*Want more information on setting up an internship program or to learn how Securities America can help your business? Contact the Securities America Recruiting Department at 800-989-8441.*

## College and University Programs Directory

Programs are continually being added, for an updated list visit [www.CFP.net](http://www.CFP.net), and click on the *For Education Partners* tab and click on *College Degree & Certificate Programs*.

### Certificate Only Programs

AL	Alabama A&M University	Normal, AL 35762
AR	Arkansas State University	State University, AR 72467
CA	California Lutheran University	Thousand Oaks, CA 91360-2700
CA	Pepperdine University	Los Angeles, CA 90045
CA	San Diego State University	San Diego, CA 92182-8236
CA	San Francisco State University	San Francisco, CA 94105
CA	Santa Clara University	Santa Clara, CA 95053
CA	University of California - Berkeley	Berkeley, CA 94720-7031
CA	University of California - Irvine	Irvine, CA 92616-6050
CA	University of California - Los Angeles	Los Angeles, CA 90024-2883
CA	University of California - Santa Barbara	Santa Barbara, CA 93106-1110
CA	University of California - Santa Cruz	Santa Clara, CA 95054-3003
CA	University of Redlands	Redlands, CA 92373
CO	College for Financial Planning	Greenwood Village, CO 80111
CO	Metropolitan State University of Denver	Denver, CO 80217-3362
CT	Fairfield University	Fairfield, CT 06824
CT	Manchester Community College	Manchester, CT 06045-1046
CT	Sacred Heart University	Fairfield, CT 06825-1000
DE	University of Delaware	Newark, DE 19716-7499
FL	Barry University	Miami Shores, FL 33161-6629
FL	Edison State College	Fort Myers, FL 33919
FL	Florida Atlantic University	Boca Raton, FL 33431
FL	Florida State College at Jacksonville - Institute for Financial Studies	Jacksonville, FL 32221
FL	Florida State University	Tallahassee, FL 32306-1640
FL	St. Petersburg College	Clearwater, FL 33760
FL	Tallahassee Community College	Tallahassee, FL 32304-2895
FL	University of Central Florida	Orlando, FL 32826
FL	University of Florida - Gainesville	Gainesville, FL 32611
FL	University of Miami	Coral Gables, FL 33124
FL	University of North Florida	Jacksonville, FL 32224
FL	University of South Florida	Tampa, FL 33620
GA	Emory University	Atlanta, GA 30306
GA	Fort Valley State University	Fort Valley, GA 31030
GA	Oglethorpe University	Atlanta, GA 30319

GA	University of Georgia	Atlanta, GA 30326-3228
HI	University of Hawaii - Manoa	Honolulu, HI 96822
IA	Iowa State University	Ames, IA 50011-4380
IL	DePaul University	Chicago, IL 60604-2289
IL	Northwestern University	Chicago, IL 60611-3070
IN	Indiana Wesleyan University	Marion, IN 46953
IN	Valparaiso University	Valparaiso, IN 46383
KS	Fort Hays State University	Hays, KS 67601-4099
KS	Kansas State University	Manhattan, KS 66506
KY	Bellarmino University	Louisville, KY 40205-1863
KY	Western Kentucky University	Bowling Green, KY 42101
LA	Southern University and A&M College	Baton Rouge, LA 70813
MA	Boston University	Boston, MA 02215
MA	Merrimack College	North Andover, MA 01845-5800
MA	Salem State University	Salem, MA 01970
MD	UMBC Training Centers	Columbia, MD 21036
MI	Cleary University	Ann Arbor, MI 48105
MI	Eastern Michigan University	Ypsilanti, MI 48197
MI	Grand Valley State University	Grand Rapids, MI 49504
MI	Oakland University	Rochester, MI 48307
MI	Saginaw Valley State University	University Center, MI 48710
MI	Walsh College	Troy, MI 48083-5066
MN	Minnesota State University - Mankato	Mankato, MN 56001
MN	University of St. Thomas	Minneapolis, MN 55403
MO	Missouri State University	Springfield, MO 65897
MO	University of Missouri	Columbia, MO 65211-0001
MO	University of Missouri - Kansas City	Kansas City, MO 64110-2426
MO	University of Missouri - St. Louis	St. Louis, MO 63121
MS	University of Southern Mississippi	Hattiesburg, MS 39406-0001
NC	Appalachian State University	Boone, NC 28608-0001
NC	Central Piedmont Community College	Charlotte, NC 28235
NC	Duke University	Durham, NC 27708-0700
NC	North Carolina A&T State University	Greensboro, NC 27411
NC	North Carolina State University	Raleigh, NC 27695
NC	Queens University of Charlotte	Charlotte, NC 28274-0001
NC	University of North Carolina-Wilmington	Wilmington, NC 28403-5678
NC	Wake Forest University	Charlotte, NC 28202
NC	Western Carolina University	Cullowhee, NC 28723
ND	North Dakota State University	Fargo, ND 58105
NE	Creighton University	Omaha, NE 68178
NE	Metropolitan Community College	Omaha, NE 68103-0777
NE	University of Nebraska - Lincoln	Lincoln, NE 65888-0236

NJ	Fairleigh Dickinson University	Madison, NJ 07940
NJ	New Jersey City University	Jersey City, NJ 07305-1588
NJ	Stockton College	Galloway, NJ 08205
NJ	William Paterson University	Wayne, NJ 07470
NM	University of New Mexico	Albuquerque, NM 87131-0001
NY	Adelphi University	Garden City, NY 11530
NY	Berkeley College	New York, NY 10017
NY	Bryant & Stratton College	Getzville, NY 14068
NY	College of Saint Rose	Albany, NY 12203
NY	Hofstra University	Hempstead, NY 11549
NY	Lehman College - The City University of New York	Bronx, NY 10468-1589
NY	Long Island University - LIU Post	Brookville, NY 11548-1300
NY	Marist College	Fishkill, NY 12524-2223
NY	Molloy College	Rockville Centre, NY 11570-1100
NY	New York University	New York, NY 10036
NY	Pace University	White Plains, NY 10606-1908
NY	State University of New York - Cobleskill	Cobleskill, NY 12043
OH	Ohio State University	Columbus, OH 43210
OH	Ohio University	Athens, OH 45701
OH	University of Akron	Akron, OH 44325-4803
OH	Xavier University	Cincinnati, OH 45207-7510
OK	Northeastern State University	Broken Arrow, OK 74014
PA	American College, The	Bryn Mawr, PA 19010-2105
PA	Duquesne University	Pittsburgh, PA 15282-0001
PA	La Salle University	Philadelphia, PA 19141
PA	Mercyhurst University	Erie, PA 16546-0001
PA	Penn State Erie - The Behrend College	Erie, PA 16563-1400
PA	Pennsylvania College of Technology	Williamsport, PA 17701-5778
PA	Temple University	Philadelphia, PA 19102
PA	Widener University	Chester, PA 19013-5700
RI	Bryant University	Smithfield, RI 02917
RI	Rhode Island College	Providence, RI 02908-1991
SC	College of Charleston	North Charleston, SC 29418-6923
SC	Midlands Technical College	Columbia, SC 29202-2408
SD	South Dakota State University	Brookings, SD 57007-0001
TN	Belmont University	Nashville, TN 37212-3758
TN	Christian Brothers University	Memphis, TN 38104-5519
TN	Tennessee State University	Nashville, TN 37209-1561
TX	Rice University - Glasscock School of Continuing Studies	Houston, TX 77251-1892
TX	Southern Methodist University	Dallas, TX 75275-0001
TX	Texas A&M University - Commerce	Commerce, TX 75429

TX	Texas State University - San Marcos	San Marcos, TX 78666-4685
TX	Texas Tech University	Lubbock, TX 79409-1210
TX	University of Dallas	Frisco, TX 75034
TX	University of Texas - Arlington	Arlington, TX 76019
TX	University of Texas - Austin	Austin, TX 78712
TX	University of Texas - San Antonio	San Antonio, TX 78249
TX	University of Texas at Dallas	Richardson, TX 75080
UT	Utah State University	Logan, UT 84322-3540
VA	Georgetown University	Arlington, VA 22201-4419
VA	James Madison University	Harrisonburg, VA 22807
VA	Old Dominion University	Norfolk, VA 23529
VA	University of Richmond	Richmond, VA 23173
VA	University of Virginia School of Continuing & Professional Studies	Falls Church, VA 22043
VA	Virginia Commonwealth University	Richmond, VA 23284
WI	Kaplan University	La Crosse, WI 54601
WI	University of Wisconsin - Oshkosh	Oshkosh, WI 54901-3551
WI	Waukesha County Technical College	Pewaukee, WI 53072
WI	Wisconsin Lutheran College	Milwaukee, WI 53226

## Undergraduate Programs

AL	University of Alabama	Tuscaloosa, AL 35487-0158
AR	Southern Arkansas University	Magnolia, AR 71754-9304
AR	University of Arkansas	Fayetteville, AR 72701
CA	California State University - Fullerton	Fullerton, CA 92831-3599
CA	California State University - Northridge	Northridge, CA 91330
CA	California State University, Sacramento	Sacramento, CA 95819-6088
CA	San Diego State University	San Diego, CA 92182-8236
CO	Colorado State University	Fort Collins, CO 80523
CO	Colorado Technical University - Colorado Springs	Colorado Springs, CO 80907
CO	Metropolitan State University of Denver	Denver, CO 80217-3362
FL	Barry University	Miami Shores, FL 33161-6629
FL	University of Florida - Gainesville	Gainesville, FL 32611
FL	University of North Florida	Jacksonville, FL 32224-2675
GA	Georgia State University	Atlanta, GA 30302-4036
GA	University of Georgia	Athens, GA 30602-2622
HI	University of Hawaii - Manoa	Honolulu, HI 96822
IL	Eastern Illinois University	Charleston, IL 61920-3011
IL	Olivet Nazarene University	Bourbonnais, IL 60914
IL	University of Illinois at Urbana-Champaign	Urbana, IL 61801
IN	Indiana State University	Terre Haute, IN 47809



IN	Purdue University	West Lafayette, IN 47907-2060
KS	Fort Hays State University	Hays, KS 67601
KS	Kansas State University	Manhattan, KS 66506-1403
KY	Murray State University	Murray, KY 42071-9077
KY	Western Kentucky University	Bowling Green, KY 42101
LA	Louisiana State University	Baton Rouge, LA 70803
MA	Suffolk University	Boston, MA 02108-2701
MD	Salisbury University	Salisbury, MD 21801-6860
MI	Central Michigan University	Mount Pleasant, MI 48859
MI	Davenport University	Grand Rapids, MI 49512
MI	Walsh College	Troy, MI 48007-7006
MI	Western Michigan University	Kalamazoo, MI 49008-5420
MN	Minnesota State University - Mankato	Mankato, MN 56001-6044
MN	University of Minnesota, Duluth	Duluth, MN 55812-3029
MO	Lindenwood University	St. Charles, MO 63301
MO	Missouri Southern State University	Joplin, MO 64801
MO	Missouri State University	Springfield, MO 65897
MO	Saint Louis University	St. Louis, MO 63108
MO	University of Central Missouri	Warrensburg, MO 64093
MO	University of Missouri	Columbia, MO 65211-0001
MO	University of Missouri - St. Louis	Saint Louis, MO 63121-4499
MS	Delta State University	Cleveland, MS 38733-1300
MS	University of Southern Mississippi	Hattiesburg, MS 39406-5072
NC	Appalachian State University	Boone, NC 28608-0001
NC	Campbell University	Buies Creek, NC 27506-0218
NC	Western Carolina University	Cullowhee, NC 28723
NC	Winston-Salem State University	Winston-Salem, NC 27110
ND	University of Mary	Bismarck, ND 58504
NE	Creighton University	Omaha, NE 68178
NJ	Rutgers University	Newark, NJ 07102
NJ	Stockton College	Galloway, NJ 08205
NJ	William Paterson University	Wayne, NJ 07470
NY	Alfred State College (SUNY)	Alfred, NY 14802
NY	Berkeley College	New York, NY 10017
NY	Bryant & Stratton College	Getzville, NY 14068
NY	College of Saint Rose	Albany, NY 12203-1450
NY	State University of New York - Cobleskill	Cobleskill, NY 12403
OH	Bowling Green State University	Bowling Green, OH 43403
OH	Franklin University	Columbus, OH 43215-5399
OH	Ohio State University	Columbus, OH 43210
OH	University of Akron	Akron, OH 44325-4803
OH	Wright State University	Dayton, OH 45435-0001

OH	Youngstown State University	Youngstown, OH 44555
OK	Northeastern State University	Broken Arrow, OK 74014
PA	Clarion University of Pennsylvania	Clarion, PA 16214
PA	Edinboro University - Pennsylvania	Edinboro, PA 16444-0001
PA	Mercyhurst University	Erie, PA 16546-0001
PA	Penn State Erie - The Behrend College	Erie, PA 16563-1400
PA	Pennsylvania College of Technology	Williamsport, PA 17701-5778
PA	Saint Joseph's University	Philadelphia, PA 19131-1376
PA	Shippensburg University	Shippensburg, PA 17257-2299
PA	Widener University	Chester, PA 19013-5700
SC	Clemson University	Clemson, SC 29634-0001
SC	Winthrop University	Rock Hill, SC 29733-0001
TX	Angelo State University	San Angelo, TX 76909-0908
TX	Baylor University	Waco, TX 76798-8004
TX	Stephen F. Austin State University	Nacogdoches, TX 75962-3004
TX	Texas A&M University - College of Agriculture and Life Sciences	College Station, TX 77843-2124
TX	Texas Tech University	Lubbock, TX 79409-1210
TX	University of North Texas	Denton, TX 76203
TX	University of Texas at Dallas	Richardson, TX 75080-3021
TX	University of the Incarnate Word	San Antonio, TX 78209
UT	University of Utah	Salt Lake City, UT 84112-0080
UT	Utah State University	Logan, UT 84322-3540
UT	Utah Valley University	Orem, UT 84058
UT	Westminster College	Salt Lake City, UT 84105-3697
VA	Liberty University	Lynchburg, VA 24502-2269
VA	Virginia Commonwealth University	Richmond, VA 23284-4000
VA	Virginia Tech (Virginia Polytechnic Institute & State University)	Blacksburg, VA 24061
WI	University of Wisconsin - Madison	Madison, WI 53706-1524
WV	Shepherd University	Shepherdstown, WV 25443
WV	West Virginia University	Morgantown, WV 26506

## Graduate Programs

AL	University of Alabama	Tuscaloosa, AL 35487
CA	California Lutheran University	Thousand Oaks, CA 91360-2700
CA	Golden Gate University	San Francisco, CA 94105-2968
CA	San Diego State University	San Diego, CA 92182-8236
CO	College for Financial Planning	Greenwood Village, CO 80111
FL	University of Florida - Gainesville	Gainesville, FL 32611
GA	University of Georgia	Athens, GA 30602-2622
IA	Iowa State University	Ames, IA 50011-4380

IL	Kaplan University	Chicago, IL 60607
KS	Kansas State University	Manhattan, KS 66506
LA	Louisiana State University	Baton Rouge, LA 70803
MA	Bentley University	Waltham, MA 02452-4705
MI	Walsh College	Troy, MI 48083-5066
MO	University of Missouri	Columbia, MO 65211
MT	Montana State University	Bozeman, MT 59717-0001
NC	Campbell University	Buies Creek, NC 27506-0218
ND	North Dakota State University	Fargo, ND 58105
NE	Creighton University	Omaha, NE 68178
NE	University of Nebraska - Omaha	Omaha, NE 68182-0001
NJ	New Jersey City University	Jersey City, NJ 07305-1588
NY	Fordham University	New York, NY 10023-7414
NY	Molloy College	Rockville Centre, NY 11571
NY	Niagara University	Niagara University, NY 14109
OK	Oklahoma State University	Stillwater, OK 74078-0001
PA	Saint Joseph's University	Philadelphia, PA 19131-1376
PA	Widener University	Chester, PA 19013
RI	Rhode Island College	Providence, RI 02908-1996
SD	South Dakota State University	Brookings, SD 57007-0001
TX	Southern Methodist University	Dallas, TX 75206
TX	St. Mary's University	San Antonio, TX 78228
TX	Texas Tech University	Lubbock, TX 79409-1210
UT	Utah State University	Logan, UT 84322-3540
UT	Westminster College	Salt Lake City, UT 84105-3697

## PhD Programs

GA	University of Georgia	Athens, GA 30602
KS	Kansas State University	Manhattan, KS 66506
MO	University of Missouri	Columbia, MO 65211
TX	Texas Tech University	Lubbock, TX 79409-1210

## Examples of Internship Expectations



### INTERNSHIP PROGRAM

- Introduction to firm
- Your objectives
- Why we created an internship
  - Additional daily activity coverage
  - Marketing preparation
  - Projects we have identified for future growth
- Benefits to an intern
  - See general workings of a financial planning practice
  - Learn how we package sophisticated financial information for the unsophisticated investor
  - Work on projects designed to improve the efficiencies and capabilities of the firm
  - Learn about the compliance requirements of a financial planning practice
- Activities
  - Daily
    - Telephone
    - Client service
  - Client meeting preparation
    - Individual
    - Pension
    - Financial plan
- College preferences
- Questions, time frame, requirements, etc.

## **INTERNSHIP DUTIES AND RESPONSIBILITIES**

Prepared for Kelly Strom  
(Spring/Summer 2015)

### 1. Operations:

- a. Client statements
- b. Scanning/filing - scanning year-end statements/DST Vision statements, organizing filing cabinet
- c. Example: Invesco is now AIM
- d. E\*Delivery - paperless statements/quarterly trade confirmations
- e. Organize I: Drive
- f. Compliance files
- g. Junxure birthdays - duplicates in calendar
- h. Orphans - records are duplicated
- i. Package up old company files for storage

### 2. Client Service:

- a. Phones - answer the main line
- b. Meet and greet clients
- c. Birthday cards
- d. Newsletters
- e. Client surveys
- f. Prepare account paperwork
- g. FP client acquisition program
- h. Help execute new marketing strategies

### 3. Training:

- a. Securities America/Junxure

## INTERNSHIP SUMMARY

Kelly Strom (Spring/Summer 2015)

- Alphabetized, scanned and filed annual statements for all clients
- Website
  - Made changes were asked for as well as corrections I found
  - Added articles and news summaries
    - Re-typed articles and corrected the mistakes in existing articles
  - Called to check on approvals
  - Set up page for Todd's Video
  - Listened to PR Mastermind review call
- Yankees event
  - Designed invitation
  - Made goodie bags
- Junxure additions
  - Added associates' contact information for 11 companies
  - Added insurance information for all clients, obtained missing information for profiles from all insurance companies, then input all information into Junxure
  - Created insurance accounts for any companies that did not have option to view online
- Golf outing
  - Made goodie bags
- 401(k) plan
  - Created a comparison and table of the plans
  - Created cover pages for each section
  - Printed all necessary information and put packets together
- John Hancock Annuities
  - Put together spreadsheet for all clients with John Hancock and called to get values of deferral dates, riders, etc.
  - Made mailing lists and found missing contacts for Guardian
- Called Junxure multiple times to resolve synching issue
  - Deleted repetitive birthdays and anniversaries from calendars
- Called contacts on Guardian mailing list to ask for interest in setting up a meeting to review 401(k) plans



## Staff Support Examples

Use this sample description if you are looking for an intern to assist you with marketing, public relations or social media activities.

### Marketing Internship Job Description:

[Insert a brief description of your firm]. We are currently looking for a Marketing Intern to assist with various projects ranging from researching new target audiences, researching and developing questions for clients surveys, reviewing document SOPs and testing for accuracy, assisting with client events, updating website and social media as needed and organizing marketing materials.

#### Learning Activities Include:

- Analysis
  - Review and rate existing marketing channels
  - Review marketing activities for effectiveness
  - Prepare charts, graphs, tables and other visual aids to be used in staff meetings
- Marketing
  - Manage social media marketing channels and update content on website
  - Monitor industry news for new marketing opportunities
  - Help coordinate client events
- Special Projects
  - Identify potential clients by specific criteria, send targeted marketing letters and contact clients to set up initial meetings
  - Assist with seminars and client appreciation events

#### Preferred Knowledge and Competencies:

- Educational background in Business Administration, Marketing or Graphic Design
- Detail oriented and a knowledge of design software is a plus
- Strong organizational skills, attention to detail and ability to work under pressure
- Ability to work collaboratively within a team
- Ability to work independently, with minimal supervision and manage multiple priorities
- Ability to communicate with co-workers, customers, and various business contacts in a courteous and professional manner
- Strong PC and software skills including Word, PowerPoint, Excel, and Adobe Creative Suite a plus
- Knowledge of story-telling tools, including graphics, sound, video and animation
- Knowledge of social media platforms
- Familiarity with the financial planning concepts preferred
- Good interpersonal, oral and written communications skills

### **Who Should Apply:**

- Students with a minimum GPA of 3.0 in the following fields: Business, Marketing, Accounting and those who want to deepen their understanding of the financial services industry.
- Students with excellent leadership, communication, teamwork and service skills.
- Student must be able to work in the United States and must successfully pass a background investigation.

Selected intern will be expected to consistently follow high standards of business and professional ethics when dealing with others and/or performing work activities. Interns are required to follow legal and regulatory requirements and company policies in dealing with clients and/or performing work activities.

To apply send your resume, cover letter stating three reasons why you feel you would be the best candidate for this position and three non-professor or family references to: ABC Wealth Management, 135 Ames, Omaha, NE 68128.

### **Sample Marketing Internship Educational Plan:**

The purpose of [firm name] internship is to provide the opportunity to apply, through practical experience, the knowledge and skills acquired in Marketing and Business Management courses. Interns will apply financial investment concepts learned through the creation of marketing materials and marketing plans, observation of existing marketing activities and research of marketing avenues. Internship offers a holistic view of how a small financial planning business is run including marketing, client services, back-office operations, compliance and business management. It is important that interns learn skills that can't be learned strictly from the classroom — things such as strong communication and client service skills. Our business is about people and helping those people along the way, making those soft skills just as important as the information they are learning through their coursework.

#### **Learning Objectives and Activities:**

- Discover what knowledge, skills and abilities are required to own and effectively run a small business
- Discover what knowledge and skills are required for an entry-level marketing agent
- Gain understanding of client discovery process to determine potential new markets
- Gain understanding of financial planning strategies based on client needs and goals
- Gain understanding of the compliance requirements of the profession
- Gain understanding of the communication and sales skills needed to be successful
- Gain practical experience in direct marketing
- Gain practical experience in client service and back-office operations
- Gain practical experience in business development (obtaining new clients)
- Gain practical experience in marketing a financial services practice including:
  - Traditional marketing
  - Social media marketing

- Gain practical experience in creating efficiency through constant process improvement for a financial services practice
- Gain practical experience in creating efficiency through technology

This is a paid position available for up to 20 hours per week. Interns are expected to adhere to the highest standards of professional conduct when interacting with the firm's clients, prospects and partners. Internship period August 1 – May 1, 20xx.



12325 Port Grace Blvd., La Vista, NE 68128

**Toll Free: 800-747-6111**

[www.JoinSAI.com](http://www.JoinSAI.com)

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