

Internship Program

Summer 2015

SUMMARY

Responsible for assisting the client services coordinator with immediate and long-term financial projects and to ensure all [REDACTED] client's expectations are met.

PRIMARY RESPONSIBILITIES

- Develop financial review packets per annual clientele review.
- Assist the client services coordinator in account paperwork preparation.
- Assist in implementing financial planning recommendations.
- Monitor market trends and maintaining prospective client reports.
- Review clients' accounts and ensure that all pertinent information is current on [REDACTED] CRM Database.
- Open accounts for clients and disburse funds according to financial goals.
- Updating all clientele prospectuses per review.
- Scanning and processing client forms.
- Manage [REDACTED] Social Media Vehicles via Socialware.
- Assisting in Financial Planning marketing programs.
- Other duties and projects as assigned.