



Ann Arbor, Michigan
www.exchangecapital.com

Job Description: Financial Planning Intern

Exchange Capital Management, a boutique, fiduciary, fee-only wealth management firm in Ann Arbor, Michigan, is seeking a Financial Planning Intern for the summer of 2023. You will be a part of a close-knit team that values learning, process, client service, and open communication.

Responsibilities

- Provide analytical support for the firm's Financial Planning team and Investment Advisors
 - Gather data utilizing internal systems
 - Develop financial plans with analysis of data and outcomes
 - Present financial plan information to lead advisor including strengths, weaknesses, and recommendations
 - Maintain CRM records and other internal databases to document our compliance with the law and the commitments we have made to our clients
- Client Support
 - Process data and paperwork from clients
- Marketing
 - Review and comment on blogs posts written by others
 - Assist in planning and execution of company events
 - Perform research that can be used in media pitches, blogs, white papers, etc.
- Special Projects

Requirements

- Pursuing undergraduate degree, with plan to graduate in 2024 or 2025
 - Enrollment in a program that satisfies the Certified Financial Planner (CFP) Certification Coursework Requirement is a plus
 - Candidates must be willing to pursue the CFP designation in their career
- High attention to detail
- Intuitive understanding and comfort with numbers and mathematics
- Desire to understand financial markets and the wealth management industry
- Drive and curiosity to build better systems to benefit the team and clients
- Adaptive and flexible, with the ability to handle multiple time sensitive requests while maintaining composure
- Resiliency, perseverance, and emotional intelligence
- Must sit for the Securities Industry Essentials® (SIE®) Exam during internship
- Watchers of Ted Lasso are preferred - BELIEVE