Financial Planning Internship

POSITION: Financial Planning Internship with Mindful Asset Planning in Apple Valley, MN

Who are we? Mindful Asset Planning (MAP) is a comprehensive financial planning and fee-only fiduciary firm that always acts in our clients' best interest. MAP provides customized personal financial planning advice to individuals, families, and businesses. Established in 1988, MAP has acquired the depth of knowledge and experience necessary to inspire clients of all ages and economic stages of their lives who seek a significant benefit from expert guidance.

MAP's unique comprehensive planning process integrates a therapeutic approach to provide both financial and human asset strategies for the best experience for clients. MAP combines an encouraging process with technical guidance on many issues including: saving and spending, accumulation, debt strategies, education planning, tax strategies, retirement planning, risk management, investment strategies, estate planning, and lifetime gifting.

How are we different than other financial planning firms? MAP differs from most advisors because as a fiduciary, we are paid directly by our clients and do not accept commissions or payments from outside sources. Our focus is always on the best possible result for our clients' financial success and well-being by providing guidance and counseling while avoiding conflicts of interest.

Why would you want to work at MAP? We are an industry-leading team of financial planners, having attained numerous designations and certifications based on our comprehensive and nurturing approach to financial planning. The MAP team is comprised of a wide range of experience from the Founders through the 2nd generation Planning and Operations team, and Residents starting their careers. We are authentic, value loyalty and hard work, and are looking for others who are committed to achieving positive outcomes for our clients and fellow team members.

Who are we looking for? MAP is currently searching for a Financial Planning Intern, who has a strong passion for helping others. We are seeking someone who is organized, detail-oriented and analytical with a friendly, caring, and compassionate personality towards people. The right candidate is motivated to help others achieve their best, encourages open communication, takes initiative, and provides leadership to help each other and our clients. We prefer someone who is driven by results and brings enthusiasm to the job each day. All MAP employees work on a variety of tasks and seek opportunities to grow and improve.

What will you get out of this internship?
Strong background in fee-only comprehensive financial planning to include:

- MAP's company history & general planning philosophies
- Financial planning analysis & recommendations including: Accumulation & Savings; Debt Reduction; Education Planning, Tax Strategies; Retirement Planning; Risk Management, Investment Strategies and Estate Planning.
- Investment analysis & recommendations
- Trading – Account rebalancing, investing cash, selling for withdrawals
- Client service experience
- Client interactions including joining client meetings with advisors
- General professional development and business skills

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Job Description:
The intern will go through a short training period where they receive an overview of MAP, our history and planning philosophies. They will also get an opportunity to job shadow our advisors during client meetings and participate in internal committee meetings. Below is a list of tasks that you may be working on during your internship with MAP.

1. Financial Planning tasks:
   - Prepare client documents for meetings
   - Schedule client meetings
   - Assist with financial planning meeting prep
   - Update post meeting to-do lists
2. Investment Management tasks:
   - Compile investment performance reports
   - Compile investment allocation (strategy) reports
   - Rebalance investments in client accounts
3. Client Services tasks:
   - Prepare account paperwork
   - Process account paperwork
   - Examples: open new accounts, transfer of assets between accounts, retirement account contributions
4. Project opportunities:
   - Create visuals to describe financial planning concepts to clients
   - Improve client information systems
5. Real World Experience (in form of job shadowing):
   - Client meetings
   - Note taking experience by way of client meetings
   - Internal committee strategy meetings
   - Internal client strategy meetings
   - Investment analysis software experience
   - Financial planning software experience

Qualifications include:
- Junior or Senior pursuing a bachelor’s degree in areas such as Financial Planning/Counseling or Finance
- Strong understanding of Windows based systems with proficiency in Microsoft Excel, Word & Outlook
- Ability to quickly learn new software systems essential to your role & responsibilities (Junxure, Morningstar, DocuSign etc.)
- Excellent verbal and written communication skills are essential to interacting with clients & teammates
- Highly motivated individual who takes initiative and works independently to manage workload
- Possesses problem solving, analytical and critical thinking skills

To apply, please send a cover letter and resume in PDF format to: careers@mindfulplanning.com

Potential for continuing internship work throughout the school year. Upon conclusion of your internship, we can review the possibility of future employment at MAP as a Financial Planning Resident.