Wealth Management Internship

Three times each year we invite 2-3 college Juniors, Seniors or post-grad CFP Certificants to explore the career of financial planning and wealth management through our unique Protege Program. The intern joins one of our advisory teams and receives technical training, one-on-one mentoring and networking opportunities. The Wealth Management Intern explores a career in wealth management and financial planning by taking on challenging and exciting responsibilities. The intern participates in strategy sessions, client meetings, and takes the lead responsibility of one key project. It is from our Protege Program that we select our future Financial Planning Analysts and Associate Wealth Managers.

Why Willis Johnson & Associates?

Willis Johnson & Associates is a fast growing, award winning, wealth management firm specializing in corporate executives and professionals. We help our clients optimize everything in their personal financial lives from compensation and benefit strategy to tax mitigation, from retirement planning to investments. We also have an in house CPA to provide tax preparation for our clients that need it. And with everything we recommend, we put our clients first—all the time, every time. No product sales. No commissions. Straight fee-only financial planning and asset management.

The same way we take care of our clients, we invest in our team. Aside from providing a very competitive benefits package including medical, dental, vision, disability/life insurance, 401(k), and PTO, we pride ourselves in supporting personal and professional growth. We encourage and incentivize continued education for all employees and support their participation in educational conferences and events. WJA is also proud to be one of the Best Places to Work for Financial Advisors by Investment News.

Essential Responsibilities

- Assist in the preparation for client meetings by preparing a high volume of Investment Review books for clients, reviewing compliance paperwork, and meeting summaries
- Help prepare financial plans, reviews, reports and client presentations
- Perform investment and other project research
- Input data into financial planning software (eMoney and Morningstar)
- Observe client investment and planning meetings
- Perform stock compliance and trade review, as needed
- Create and analyze performance reports for investment committee meetings
- Compile and research technical analysis using Dorsey Wright Point & Figure methodology
- Attend weekly Financial Planning and Investment team meetings.
- Learn how to identify qualified prospects for business development purposes, as needed

Qualifications

- Finance, Business, Accounting, or Financial Planning major preferred with a minimum GPA of 3.2
- Highly interested in a career in Wealth Management or Financial Planning
- Demonstrated track record of initiative
- Strong technology, research and organizational skills
- Enjoys research and analysis
- Confident, poised and professional in appearance
- Capable of taking on creative challenges and tight deadlines

To Apply- Because we offer only two internships each year, we're looking for exceptional candidates. Our entire team participates in the intern selection process. To apply, please email your resume and cover letter to jobs@wjohnsonassociates.com with your full name, followed by "Internship" in the subject line.