

Summer Intern – Wealth Management

The Summer Intern supports the Infinitas advisory team by gaining hands-on exposure to financial planning, portfolio management, operations, and client service. This structured internship is designed to provide meaningful experience across departments while developing professional skills and industry knowledge.

Summary of responsibilities

The Summer Intern provides support to Advisors, Paraplanners, and Operations team members while participating in structured learning and project work.

- Gain an understanding of broker-dealer relationships and compliance structure (Commonwealth overview).
- Assist with CRM updates, workflow documentation, and systems organization.
- Support operational summer projects and process improvement initiatives.
- Input and maintain client data in financial planning software under supervision.
- Assist with review preparation, including generating allocation reports and organizing meeting materials.
- Support paraplanning efforts including client summary memos and insurance needs analysis exposure.
- Observe and participate in client meetings; assist with note-taking and meeting preparation.
- Attend meeting debriefs to understand advisor communication styles and planning strategies.
- Gain exposure to investment philosophy, allocation models, ETFs/mutual funds, and performance reporting.
- Assist with monthly reporting and portfolio review preparation.
- Complete a structured summer project, culminating in a final presentation to leadership.
- Participate in mentor check-ins, feedback sessions, and a formal reflection/exit review.
- Maintain professionalism and confidentiality when handling client information.

Qualifications:

- Currently pursuing a BA or BS in Business, Finance, Economics, or related field
- Strong attention to detail and organizational skills
- Professional communication skills (written and verbal)
- Ability to handle confidential information responsibly
- Proficiency in Microsoft Office Suite
- Interest in financial planning, investment management, or wealth management operations
- Self-starter with a positive attitude and willingness to learn

Perks & Benefits:

- Structured exposure to all departments within a growing wealth management firm
- Competitive salary based on experience.
- Mentorship from Advisors and Operations leaders
- Meaningful, resume-building project experience
- Participation in firm meetings and team events
- Professional development and feedback to support career growth
- Positive team environment focused on learning and collaboration