



Let's build your future together!

621 7<sup>th</sup> Avenue, Beaver Falls, PA 15010  
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## **Intern**

Jumet Financial is committed to providing our clients with well-informed, objective advice, and to create a disciplined framework within which financial decisions are made, implemented, and managed from generation to generation. Jumet Financial is seeking a highly efficient and detail-oriented individual with the same strong standards for the role of Summer Intern. The position requires a high level of confidentiality and professionalism, excellent time and project management skills and the ability to manage multiple work streams (both internal and external) at once. The qualified candidate must show high regard for client needs and not only be efficient, but also build rapport with current clients and prospective clients.

### **Primary Duties and Responsibilities:**

- Answering company phone calls
- Managing company mail and forwarding to team members as appropriate
- Filing documents, ordering office supplies and maintaining office equipment
- Assist with marketing and advertising activities upon request
- Assist in Event Planning (ex: small open house events)
- Assist in coordinating team meetings and agendas
- Assisting in client onboarding, serving as a backup to Client Service branch as necessary
- Assist Advisors in prepping for client meetings as well as sitting in on those meetings.
- Assist all branches of Jumet financial with any requested project work.
- Other duties as assigned

### **Qualifications:**

- Post-secondary degree in progress and willingness to continue education
- Strong passion to work in and succeed in the financial industry
- Excellent Computer skills (MS Word, Excel, PowerPoint, and Outlook)
- Excellent communication skills (spelling, grammar and proofreading written skills and verbal skills)
- Excellent organizational and time management skills
- Ability to prioritize and multi-task
- Ability to exercise confidentiality and discretion

Eligible candidates will be required to have clearances and pass a background check.

All qualified candidates should contact Mallory Romano at 814-525-7063 or email resumes to [mallory.romano@jumetfinancial.com](mailto:mallory.romano@jumetfinancial.com)