

ADVISORY INTERNSHIP



Jumet Financial is committed to providing our clients with well-informed, objective advice and to creating 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 Advisory Intern. The position requires a high level of confidentiality and professionalism, excellent time and project management skills, and the ability to manage multiple workstreams (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 and prospective clients.

Primary Duties and Responsibilities:

- Manage company mail and forward to team members as appropriate
- File documents, order office supplies, and maintain office equipment
- Assist with marketing and advertising activities upon request
- Learn, engage, and develop toward a potential career path
- Answer company phone calls
- Assist with event planning (e.g., small open house events)
- Assist with coordinating team meetings and agendas
- Assist with client onboarding, serving as backup to the Client Service branch as necessary
- Assist advisors with prepping for client meetings, as well as sitting in on those meetings
- Assist all branches of Jumet Financial with any requested project work
- Perform other duties as assigned by management
- Help serve our community through initiatives planned by the Jumet Financial team, as required of all employees

Qualifications:

- Associate's or bachelor's degree (in progress or completed) in a finance-related field, with a willingness to continue education toward certifications and/or advanced degrees
- Strong passion for working and succeeding in the financial industry
- Willingness to obtain various securities and insurance registrations, as required
- Excellent computer skills (MS Word, Excel, PowerPoint, and Outlook)
- Excellent written and verbal communication skills, including strong spelling, grammar, and proofreading abilities
- Excellent organizational and time management skills
- Ability to prioritize and multitask
- Ability to maintain confidentiality and exercise discretion