

# BUSINESS 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 Business/Operations Intern. This role offers hands-on exposure to the firm's internal business functions, providing valuable experience for someone interested in the operational and administrative side of a financial services firm. 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 Compliance with organizing and maintaining regulatory documentation and recordkeeping
- Assist with tracking compliance deadlines and supporting internal audits as needed
- Assist Operations with process documentation, workflow improvement projects, and internal system maintenance
- Assist Training with organizing and coordinating internal training materials and sessions
- Assist Human Resources with new employee onboarding and maintaining personnel documentation
- Shadow the Managing Director and support ad hoc business and strategic initiatives
- Assist with coordinating internal team meetings, agendas, and follow-up items
- 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 business, operations, finance, or a related field, with a willingness to continue education toward certifications and/or advanced degrees
- Strong passion for working and succeeding in the financial industry
- 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