



(post to Margaret Haley. MHaley@BU.Edu)

## Internship

Thompson Wealth Management, Ltd. (TWM) is a private SEC registered investment adviser providing comprehensive financial planning and investment management to high net worth families. Founded in 1991, TWM was a pioneer in bringing fee-only advisory services, as well as Personal CFO services to individuals. See [www.twmltd.com](http://www.twmltd.com) for more information.

### Position

Paid internships at TWM are *quid pro quo* – you supply commitment and hard work, and we teach you the ropes of a wealth management practice, and give you hands on exposure to software and other building blocks that will increase your value as you advance in the profession. Internships involve working on a specific project as well as a range of planning, back office and investment oriented competencies, including client facing activities. The firm's current Vice President – Financial Planning came to us through the Boston University Financial Planning program.

### Project

The intern works directly with the firm's investment officer to implement cloud-based trading, portfolio modeling and rebalancing programs, establish ongoing trading and reconciliation procedures, while assisting with digital integration and maintenance of client financial planning information on our interactive digital platform data. The intern will gain significant experience working with cutting edge RIA programs, such as Orion, Junxure Cloud CRM, Fidelity Wealthscape, eMoney, Money Guide Pro, Goal Gami, and Finametrica.

### Competencies

- Bachelor's degree and experience working in a professional environment
- Demonstrated commitment to a career in personal investment or financial planning
- Ability to learn new technology systems quickly;
- Proficiency with MS Office, Excel, experience with CRM a plus
- Personal integrity, honesty, strong work ethic, positive "can do" attitude
- Outstanding communication, written and verbal
- Comfortable working independently and as part of a team
- Ability to organize and execute a project, while juggling multiple tasks
- Strong attention to detail
- Professional appearance and presentation -- an ambassador for the firm

### Terms

Fall and Spring semester, 2017-18

Minimum 18 hours per week

Compensation is \$15 to \$25 per hour depending on experience

Resume to Carla Cappucci, Office Manager, [Carla@twmltd.com](mailto:Carla@twmltd.com)