



WEALTH MANAGEMENT EXTERN

FIRM OVERVIEW

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. We are a growing team of eight separated across two business segments: Wealth Management and Asset Management.

EXTERNSHIP PROGRAM SUMMARY

Monte Financial Group, LLC seeks to provide students an opportunity to learn about professional wealth management opportunities at a registered investment advisor (RIA) through our 1-month externship program.

Students are expected to shadow our team of Wealth Advisors 2-days a week for approximately 3-4 hours a day. During this time, students will learn about the financial planning process, client communication, center of influence (COI) networking opportunities, CRM and custodial systems, as well as internal communications with client service representatives and the asset management team.

Additionally, students will implement the *Financial Planning Process* by working on a financial plan and an investment policy statement (IPS) based on fictional client information. The plan will be presented to our Wealth Management team.

This opportunity is unpaid and will be offered in the fall and spring at our office in Guilford, Connecticut. Applications are only available to seniors.

KEY ACCOUNTABILITIES

- Learn about our Wealth Management division and firm culture
- Shadow MFG Wealth Advisors to learn about their daily tasks/responsibilities
- Engage in Monte Financial Group's *Financial Planning Process*
 - Learn how to create a basic plan on retirement planning software
 - Interview a fictional client to gather necessary information for a financial plan
 - Write and present a financial plan to our Wealth Management team based on fictional client information
 - Complete an investment policy statement (IPS) based on fictional client information

QUALIFICATIONS

- For Fall/Spring externship program must be at least an undergraduate senior
- Pursuing a BA/BS in Business related field or Economics
- Minimum GPA of 3.0
- Proficient in Microsoft Excel, Microsoft PowerPoint, Microsoft Word

HOW TO APPLY

For further inquiry, please email alex.r.monte@montefinancialgroup.com with an attachment of your resume.

For additional company information you may find us on [LinkedIn](#) or on our [Website](#).

All qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, religion, sex, sexual orientation, national origin, age, disability, protected veteran status, genetic information, marital status, gender identity or any other impermissible criterion or circumstance. Monte Financial Group, LLC also takes affirmative action in support of its policy to hire and advance in employment individuals who are minorities, women, protected veterans, and individuals with disabilities.