



Financial Symmetry's internship program has been fostering relationships with NCSU students studying finance for twenty years. In fact, over half of our 25-member Team started their career with us as an intern from State! We are excited to be in position to offer our internship to Triangle undergraduates in our program.

Financial Symmetry (FSI) is an independent, comprehensive wealth management firm located near the PNC Arena & Carter Finley. We're a fee-only firm, meaning we're not cold calling prospects or selling insurance for commissions. We don't sell products.

This spring, we are looking for interns to fulfill various roles within our firm on a part-time basis (15-20 hours/week), starting in January, with the prospects of continuing through the summer (30-35 hours/week). This internship will be in our Raleigh office following strict COVID precautions, alongside a fully vaccinated team. This is not a remote internship.

We're looking for candidates interested in the many different stages of the financial planning, tax planning, investment management and overall wealth management processes including but not limited to:

- Taking inventory of client assets, debts, incomes and expenses
- Scanning and/or saving electronic documents to our database
- Data reconciliation for 401ks, 403bs, 457 deferred comp and 529 accounts for performance reporting
- Assisting with trade verification processing
- Initial data entry into planning software
- Compile global reports at a firm level for process improvements
- Assist our marketing team with research projects
- Onboarding paperwork processing
- Track incoming account transfers
- Cash flow monitoring
- Assisting our tax preparers with 2021 tax return preparation:
 - Calculating estimated YTD income and tax withholding
 - Scanning, sorting and marking documents
 - Initial data entry under guidance of tax preparer
- Help our firm identify areas where we can improve data integrity, data processing and assist with both refinements, testing and implementation of those improvements

Our ideal candidates would have a genuine interest in exploring the personal financial planning industry and/or wealth management, and be currently enrolled in finance, accounting and/or operations management classes. A working knowledge of personal finance terms is a huge plus.

To get a jump start on our interview process, we encourage applicants to take a quick assessment so we can get a sense of personality, strengths and areas we can help you improve on here - <https://www.ondemandassessment.com/link/index/JB-UPSA8HMOD?u=128214>

Learn more about our internship program here: <http://financialsymmetry.com/our-team/our-internship-program>. Our interns earn \$18.00/hour to start, increasing with experience.

To apply, please send your resume, brief cover letter, unofficial transcript, and spring class schedule with your hours of availability to Heather Gudac – hgudac@financialsymmetry.com