



About the job

Founded in 1987 and based in the San Francisco Bay Area, Litman Gregory offers its services to individuals, families, and endowment and foundation organizations. Now a part of iM Global Partner, a worldwide asset management network, Litman Gregory Wealth Management benefits from a global network of professionals in 16 locations worldwide. Our relationships are built on trust, respect, and integrity and our research services are driven by strong asset allocation and manager selection expertise.

We believe that **'Performance is born out of people'** and that our strength comes from our differences. Our summer intern opportunities are an important element of our long-term recruitment strategy, open to rising undergraduate juniors and seniors interested in exploring the financial planning and wealth management industry.

As a **Wealth Management Intern**, you will receive an overview of wealth management and the roles within. You will be trained on specific software used throughout the firm, participate in mentoring and learning sessions, and add value through your unique perspective and academic background. Your internship will provide the opportunity for responsibilities in diverse areas including operations, assisting with client service, meeting preparation and administrative tasks. In addition, you will have the ability to interact with other iMGP interns working abroad.

Based on business need, this non-exempt, temporary role is to be performed full-time on site; this is not a remote or hybrid position. Role duration is 3 months.

Responsibilities

- Contribute to projects and processes that support the achievement of business goals
- Assist in service and operations functions to streamline processes and strengthen the client and colleague experience
- Utilize wealth management technology such as the Customer Relationship Management (CRM) and portfolio management systems to maintain client information and data
- Support the client services and administrative team as requested
- Contribute to preparation of materials for current and prospective clients
- Contribute to a positive and empowering environment across teams
- Adhere to all compliance/risk procedures and follow corporate and industry protocols

Skills and experience

Essential

- Actively pursuing undergraduate degree from an accredited institution, college, or university
- Strong desire to gain further understanding of the global wealth management business
- Organized, detail-oriented and able to multitask with proven ability to plan and achieve results
- High level proficiency in Word, Excel, PowerPoint, Outlook

- Ability to maintain absolute confidentiality of information
- Team player and collaborative
- Self-starter with entrepreneurial spirit

Salary

The base rate of pay for this role is \$20/hour, plus mileage-based commute subsidy

Reporting Lines

This role reports to VP – Portfolio Trading & Analytics

Location

The role will be based in our Walnut Creek, CA office.

Submission Deadline

May 25, 2023

Litman Gregory and iM Global Partner are equal opportunity employers. We celebrate diversity and are committed to creating an inclusive environment for all employees. Litman Gregory and iM Global Partner encourage applications from people of all races, religions, national origins, genders, sexual orientations, gender identities, gender expressions, and ages, as well as veterans and individuals with disabilities.

If you are ready to join a team focused on excellence and ready to reap the rewards that come with it, then we invite you to apply with your resume and a short cover letter to us-recruitment@imgp.com .