

## About the job

### About Litman Gregory and iM Global Partner

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.

At iM Global Partner (iMGP) and Litman Gregory, 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.

### The Role

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 temporary, non-exempt role is to be performed full-time on site; this is not a remote or hybrid work-from-home position.

### Responsibilities

- Work with our advisory team on strategic projects and processes that have real impact on clients and services offered
- Assist in service and operations functions to streamline processes and strengthen the client experience
- Utilize the Contract Relationship Management (CRM) system to track client information and data
- Support the client services and administrative team as needed
- Contribute to a positive and empowering environment across teams
- Adher to all compliance and risk procedures following corporate and industry protocols

### Qualifications

#### *Essential*

- Strong academic background and be actively pursuing an undergraduate degree from an accredited institution, college or university, preferably with focus in Finance, Economics or Marketing
- Exhibited interest in gaining further understanding of the 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, collaborative, able to work with and through others
- Self-starter with entrepreneurial spirit

**Salary**

The base rate of pay for this role is \$21/hour

**Location**

Walnut Creek, CA or Larkspur, CA

*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](mailto:us-recruitment@imgp.com).