ONEWEALTH
INVESTMENT MANAGEMENT, LLC

2987 CLAIRMONT ROAD, SUITE 225
ATLANTA, GA 30329

JOB REC: Summer 2022 Financial Advisor Internship

JOB TITLE: Financial Advisor Internship

BUSINESS OBJECTIVES: The **Financial Advisor Internship** role is designed to be an introduction to the business activities of a financial advisor in a Registered Investment Advisory firm. Acquired experience will include activities in the following functions: marketing, compliance, and operational support activities, branch seminar planning and execution, promotion of prospect development, client acquisition, and other branch activities, assistance with client services as allowable.

ACADEMIC OBJECTIVES: Interns will successfully complete the internship with his or her acquisition of the FINRA Series 66, Georgia Accident and Sickness (Health & Life), and Variable Product Insurance Licenses. Interns will be prepared for entry-level position with a Registered Investment Adviser and/or Insurance Company.

JOB DESCRIPTION: Semester length, fifteen-week internship, 2-3 workdays per week depending on course schedule, approximately 15-20 hours per week at company office. Workday divided roughly half for study and half for participation in company meetings and assigned tasks.

MINIMUM QUALIFICATIONS: High School graduate, active pursuit of an academic degree or diploma in a Business-related field; competency with MS Office (Word, Excel, PowerPoint), interest in career within a Legal, Medical, Finance, Insurance, Mortgage, or Real Estate industry.

CORE COMPETENCY REQUIREMENTS: Analytical, communication, and organizational skills are essential. Must possess strong written and oral communication abilities. Must be a detail-oriented problem-solver able to employ leadership, critical thinking, and time management skills working effectively both independently and in teams.

COMPENSATION: All training provided at company expense. Mileage reimbursement for any travel required during workdays. Occasional lunches provided.

COMPANY DESCRIPTION: The OneWealth family of companies provides clients a comprehensive suite of financial, advisory, and management services to business owners, individuals, and families. The OneWealth family of companies includes a Business Advisory Practice, a Registered Investment Advisor, an Accounting and Tax practice, a Real Estate Brokerage, Independent Insurance Broker, and Independent Mortgage Broker.

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