



Building the Bridge to Your Financial Future

Intern - Position Description

Full/Part Time:	PT	Hours:	10 - 15	Exempt:	N
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Summary:

Szarka Financial Management (SFM) has been serving individuals, Retirees, both large and small businesses, and unions in the Greater Cleveland area since 1985. We differ from our competitors in many ways. First, we are a planning firm - not a sales organization. We work in our clients' best interests, not to achieve sales quotas. Second, we provide a team approach to planning, providing personal attention every step of the way. At SFM, our clients are counseled in a consistent manner and receive the same innovative level of advice and hands-on, personalized service. Third, we provide customized solutions for our clients - not a "cookie cutter" approach to financial planning. Fourth, and most importantly, our planners' time is utilized at their highest and best use - with their clients! The firm provides full administrative and marketing support to Planners to help them grow their book of business. Szarka Financial is a client-centric firm that empowers its staff and Planners to find the most effective methods to bring exceptional value to all clients.

As a result of our growth, we are seeking a dynamic individual who wishes to enhance their classroom academics with hands-on learning in a professional work place environment. The candidate selected will have the opportunity to apply their knowledge to support our team of financial advisors, while gaining excellent "real world" experience in the financial services industry.

Responsibilities:

- Providing support to SFM planners (e.g., special projects, research & analysis)
- Complete all assigned projects with high degree of professionalism

Duties:

- Preparing client reviews, including investment performance reports
- Researching & preparing reports on mutual funds
- Researching various financial planning questions & topics
- Sitting in on client planning sessions & reviews
- Assist in writing articles for company newsletter
- Completion of various tasks related to investment databases
- Completion of special projects as assigned by SFM President

Qualifications, Required Skills and Proficiencies:

- Finance major, GPA of 3.5 or better
- Excellent organizational, time management and project management skills
- Excellent problem solving skills
- Strong PC skills with proficiency using MS Office (Word, Excel, PowerPoint)
- Strong interpersonal and relationship building skills
- Excellent written, oral communication and presentation skills
- Strong knowledge of financial services industry relating to investment vehicles