Larson Financial is a nationwide planning and investment advisory firm that specializes in serving the financial needs of physicians and dentists. We are looking for highly ethical and tenacious individuals to become a part of our rapidly expanding team. Larson Financial is a faithful and integrity-driven company. Our comprehensive approach to financial planning offers unique solutions for doctors from residency to retirement. Through our collaborative environment, Larson Financial helps individual physicians and their medical practices succeed in the highly competitive and regulated healthcare field.

We are currently looking for a Finance Intern to actively support the practice of a Financial Advisor.

Duties will include:

- Review actions via dashboard – help hold the Advisor accountable for completion of tasks.
- Filter prospects weekly and produce call/email lists.
- Input data to CRM; clean up client accounts – profile, contact info, and salutation fields
- Input data to financial planning software (MGP)
- Call group benefits coordinators for plan information
- Compile welcome folders
- Print, highlight, and flag applications
- Run insurance illustrations
- Perform marketing tasks – send invitations from email, data mine, upload prospects into Sales Force
- Attend select client teleconferences – take notes
- Perform daily office functions – phones, mail, supplies inventory, etc.

Requirements:

- Computer Science degree preferred
- Undergrad and graduate student
- Highly proficient on the computer, able to learn new programs quickly

Hourly Wages:

- $10 - $15 an hour
- Hours per week will be determined by the convenience of the intern and employer.

Application:
Please send a cover letter and resume to Jake Whipp: jake.whipp@larsonfinancial.com