

Available: Summer 2016
Company: RTD Financial Advisors, Inc.
Contact: Marc Labadie
Apply: Email Cover Letter and Resume to career@rtdfinancial.com
Deadline: March 4, 2016



RTD Financial Advisors, Inc., is offering a paid Investment Department summer internship in our Philadelphia office. RTD is a distinguished, nationally recognized, fee-only financial life planning firm. Recently, RTD was named as [Financial Planning Magazine's 2016 "Top 150 RIA Leaders,"](#) [Financial Times 2015 "300 Top Registered Investment Advisers"](#) and [Philadelphia Business Journal's "Best Places to Work 2015."](#)

If you are working toward a degree in finance, investment management, financial planning and/or a CFP[®], or CFA[®] designation, and your career goal is to become part of an investment management or financial planning firm, we are interested in you. While having completed courses or other experience in investment management or financial planning is definitely a plus, the most important attribute is a strong desire to be interested in an investment or financial planning focused career. Many of our past internships have led to full-time job offers upon graduation.

Over the summer you will have the opportunity to work with the Chief Investment Officer, Chief Operating Officer and other members of the Investment Department and the Investment Policy Committee. This is a unique opportunity to learn from, and be a part of, investment thought leaders in a progressive financial planning firm. Candidates that fit our firm's culture prefer working on a team, believe in providing unbiased investment advice to our clients, and have a commitment to the highest levels of ethics and client service. The position entails experiencing many different aspects of investment management and having fun doing so.

Key Qualifications:

- Working toward a degree in Finance, Investment Management, Financial Planning or a related field and/or a CFP[®] or CFA[®]
- Committed to a career in investment management or financial planning
- Strong verbal and written communication skills
- Self-starter, problem solver and goal-oriented team player with 'no job is beneath me' attitude
- Organized, with a strong attention to detail
- Exudes professionalism and respect
- Strong expertise with Excel is a plus

Duties and Responsibilities:

- Participate as an active member of the firm, embracing RTD's Financial Life Planning process
- Participate in investment management implementation
- Participate in portfolio research and construction
- Prepare reports and analysis based on client service requests
- Interpret and input summarized tax information for each client into CRM software
- Serve as a member of RTD's APEX (Advanced Planning Excellence) Committee
- Attend RTD's Financial Planning, Investment Policy, and Retirement Committee meetings
- Assist Investment Department and Investment Policy Committee with specific projects
- Commit to continuing investment management and/or financial planning education
- Perform other duties as assigned