



Available: Summer 2017  
Recruiter: Chris Vassallo  
Application Deadline: December 26<sup>th</sup> 2016  
Final Decision to be made by January 20<sup>th</sup> 2017  
See "Apply" section for application instructions

RTD Financial Advisors, Inc., is offering a paid Financial Planning 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 2016."](#)

If you are working toward a degree in financial planning and/or a CFP<sup>®</sup> designation, and your career goal is to become a financial planner, we are interested in you. While having completed courses in financial planning courses is definitely a plus, the most important attribute is a strong desire to be an outstanding financial planner.

Over the summer you will have the opportunity to work with several financial planners and other members of the firm. This is a unique opportunity to learn from, and be a part of, a progressive financial planning firm. Candidates that fit our firm's culture prefer working on a team, believe in comprehensive financial planning with a focus on life planning, and have a commitment to the highest levels of ethics and client service. The position entails experiencing many different aspects of financial planning and having fun doing so.

#### **Key Qualifications:**

- Working toward a degree in Financial Planning or a related field and/or the CFP<sup>®</sup> certification
- Committed to the financial planning process
- 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
- Demonstrate curiosity and confidence when interacting with financial planners
- Experience working with eMoney, Money Guide Pro, Junxure, and PortfolioCenter is a plus

#### **Duties and Responsibilities:**

- Participate as an active member of the firm, embracing RTD's Financial Life Planning process
- Assist in preparation for client meetings
- Draft follow up letters, create emails and input actions from meetings into CRM software
- Participate in financial plan implementation
- Attend client meetings and 401k enrollment meetings, as the opportunities arise
- Prepare reports and analysis based on client service requests
- Interpret and input summarized tax information for each client into CRM software
- Assist in summarizing estate planning documents
- Serve as a member of RTD's APEX (Advanced Planning Excellence) Committee
- Attend RTD's Financial Planning, Investment, and Retirement Committee meetings
- Assist various committees with specific projects
- Commit to continuing financial planning education
- Perform other duties as assigned

#### **Apply:**

- Applications must contain a cover letter, resume and completed "Employment Application" and should be submitted as one file in PDF format via email to [careers@rtdfinancial.com](mailto:careers@rtdfinancial.com)



**RTD Financial Advisors, Inc.**

United Plaza Building  
 30 South 17<sup>th</sup> Street  
 Suite 1620  
 Philadelphia, PA 19103  
 215-557-3800

## Employment Application

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**WE ARE AN EQUAL OPPORTUNITY EMPLOYER. Qualified applicants receive equal consideration for positions without regard to race, religion, sex, national origin, age, disability, veteran status, marital status, sexual orientation, or any other consideration made unlawful by applicable federal, state, or local laws.**

**Please answer all questions completely and accurately.**

Personal Information					
<b>Position applying for:</b>		<b>Date:</b>			
<b>Last Name:</b>		<b>First Name:</b>			
<b>Middle Initial:</b>		<b>Phone Number:</b>			
<b>Street Address:</b>		<b>City, State Zip:</b>			
If you are under the age of 18, can you present the necessary work certificate at the time of employment?				Yes	No
				<input type="checkbox"/>	<input type="checkbox"/>
Type of Employment Desired:	Full-time	Part-time	Are you willing to work overtime if necessary?	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Are you legally authorized to work in the U.S.	Yes	No	When are you available to begin work?		
	<input type="checkbox"/>	<input type="checkbox"/>			
Have you ever applied to this company before?	Yes	No	If yes, when and for which position did you apply?		
	<input type="checkbox"/>	<input type="checkbox"/>			

### Skills & Education

List any technical skills that qualify you for the position:

Education	School Name and Location	Graduate?	# Years Completed	Degree/Major
High School				
College				
Business/Technical/Trade School				
Post College				

### Military Service

Branch:	
Start Date:	
Leave Date:	
Rank at Discharge:	

### Work Experience

Employer (start w/most recent):				
Type of Business:		Phone #		
Street Address:		City, State Zip:		
Job Title:				
Start Date:		Leave Date:		Reason for Leaving:
Wages Start:		Wages Leave:		
Supervisor's Name:			May we contact? Yes <input type="checkbox"/> No <input type="checkbox"/>	

Employer:			
Type of Business:		Phone #	
Street Address:		City, State Zip:	
Job Title:			
Start Date:		Leave Date:	Reason for Leaving:
Wages Start:		Wages Leave:	
Supervisor's Name:		May we contact? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Employer:			
Type of Business:		Phone #	
Street Address:		City, State Zip:	
Job Title:			
Start Date:		Leave Date:	Reason for Leaving:
Wages Start:		Wages Leave:	
Supervisor's Name:		May we contact? Yes <input type="checkbox"/> No <input type="checkbox"/>	

References				
Name	Position	Company	Relationship	Phone #

**Applicant Certification**

I understand and agree that if driving is a requirement of the job for which I am applying, my employment and/or continued employment is contingent on possessing a valid driver's license and automobile liability insurance in an amount equal to the minimum required by the state where I reside.

I understand that RTD Financial Advisors, Inc. may now have, or may establish, a drug-free workplace or drug and/or alcohol testing program consistent with applicable federal, state, and local law. If RTD Financial Advisors, Inc. has such a program and I am offered a conditional offer of employment, I understand that if a pre-employment (post-offer) drug and/or alcohol test is positive, the employment offer may be withdrawn. I agree to work under the conditions requiring a drug-free workplace, consistent with applicable federal, state, and local law. I also understand that all employees of the location, pursuant to RTD Financial Advisors, Inc.'s policy and federal, state, and local law, may be subject to urinalysis and/or blood screening or other medically recognized tests designed to detect the presence of alcohol or controlled drugs. If employed, I understand that the taking of alcohol and/or drug tests is a condition of continual employment and I agree to undergo alcohol and drug testing consistent with RTD Financial Advisors, Inc.'s policies and applicable federal, state, and local law.

If employed by RTD Financial Advisors, Inc., I understand and agree that RTD Financial Advisors, Inc., to the extent permitted by federal, state, and local law, may exercise its right, without prior warning or notice, to conduct investigations of property (including, but not limited to, files, lockers, desks, vehicles, and computers) and, in certain circumstances, my personal property.

I understand and agree that as a condition of employment and to the extent permitted by federal, state, and local law, I may be required to sign a confidentiality, non-compete, and/or conflict of interest statement.

I certify that all the information on this application, my résumé, or any supporting documents is complete and accurate to the best of my knowledge. I understand that any falsification, misrepresentation, or omission of any information may result in disqualification from consideration for employment or, if employed, disciplinary action, up to and including immediate dismissal.

I UNDERSTAND THAT NEITHER THIS APPLICATION NOR ANY COMMUNICATION BY A MANAGEMENT REPRESENTATIVE IS INTENDED TO CREATE OR DOES CREATE A CONTRACT OF EMPLOYMENT, OFFER, OR PROMISE OF EMPLOYMENT. I ACKNOWLEDGE THAT IF HIRED BY RTD FINANCIAL ADVISORS, INC., EMPLOYMENT IS ON AN AT-WILL BASIS. THIS MEANS RTD FINANCIAL ADVISORS, INC. IS FREE TO TERMINATE MY EMPLOYMENT AT ANY TIME, WITH OR WITHOUT CAUSE OR ADVANCE NOTICE, IN ACCORDANCE WITH STATE LAW, AND ACCEPTANCE OF EMPLOYMENT IS NOT A CONTRACT OF EMPLOYMENT FOR ANY SPECIFIED TIME. SIMILARLY, I AM FREE TO TERMINATE MY EMPLOYMENT WITH RTD FINANCIAL ADVISORS, INC. AT ANY TIME FOR ANY REASON. THIS AT-WILL PROVISION MAY BE MODIFIED OR WAIVED ONLY IN A WRITTEN AGREEMENT SIGNED BY AN AUTHORIZED REPRESENTATIVE OF RTD FINANCIAL ADVISORS, INC. AND ME. I AGREE TO CONFORM TO THE RULES AND REGULATIONS OF RTD FINANCIAL ADVISORS, INC., AND I UNDERSTAND THAT RTD FINANCIAL ADVISORS, INC. HAS COMPLETE DISCRETION TO MODIFY SUCH RULES AND REGULATIONS AT ANY TIME, EXCEPT THAT IT WILL NOT MODIFY ITS POLICY OF EMPLOYMENT AT-WILL.

I authorize RTD Financial Advisors, Inc. or its agents to confirm all statements contained in this application and/or résumé as it relates to the position I am seeking and to the extent permitted by federal, state, or local law. I agree to complete any requisite authorization forms for the background investigation.

I authorize and consent to, without reservation, any party or agency contacted by this employer to furnish the above-mentioned information. I hereby release, discharge and hold harmless, to the extent permitted by federal, state, and local law, any party delivering information to RTD Financial Advisors, Inc. or its duly authorized representative pursuant to this authorization from any liability, claims, charges, or causes of action which I may have as a result of the delivery or disclosure of the above requested information. I hereby release from liability RTD Financial Advisors, Inc. and its representative for seeking such information and all other persons, corporations, or organizations furnishing such information.

If hired by RTD Financial Advisors, Inc., I understand that I will be required to provide genuine documentation establishing my identity and eligibility to be legally employed in the United States. I also understand RTD Financial Advisors, Inc. employs only individuals who are legally eligible to work in the United States.

<b>Applicant's Signature:</b>		<b>Date:</b>	
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