

# Internship Program

## Summer 2015

### SUMMARY

Responsible for assisting the client services coordinator with immediate and long-term financial projects and to ensure all [REDACTED] client's expectations are met.

### PRIMARY RESPONSIBILITIES

- Develop financial review packets per annual clientele review.
- Assist the client services coordinator in account paperwork preparation.
- Assist in implementing financial planning recommendations
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

Monitor market trends and maintaining prospective client reports

Review clients' accounts and ensure that all pertinent information is current on Delta's CRM Database.

Open accounts for clients and disburse funds according to financial goals.

Updating all clientele prospectuses per review.

Scanning and processing client forms.

Manage Delta's Social Media Vehicles via Socialware

Assisting in Financial Planning marketing programs.

Other duties and projects as assigned.