

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]
- [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.
Sorting and processing client forms

Manage Delta's Social Media Vehicles via Socialware

Assisting in Financial Planning marketing programs.
Other duties and projects as assigned.