



PROSPERITY  
PLANNING

## Financial Planning Internship

This internship is designed to expose rising seniors to the opportunities and responsibilities of an Associate at a truly comprehensive fee-only financial planning firm. This opportunity will help you grow your skills, jump start your career, and make a real contribution to serving clients.

The program is highly structured over the course of eight weeks in the summer. Over this period, you will experience structured training including:

- Introduction to “Who We Are” – Core Purpose, Mission, and Values
- Introduction to the Prosperity Planning Blueprint™ Process
- Ability to sit in on select client meetings with Wealth Managers
- eMoney financial planning software training
- Opportunities to both maintain and complete Prosperity Planning Blueprint™ client deliverables
- Job shadowing of full-time associate team members
- A capstone presentation of a comprehensive financial plan made to firm partners in the final week

### Qualifications

- Pursuing a bachelor’s degree in the summer before your senior year (B.S. in Financial Planning, Finance, Business, or Accounting desirable)
- Superb organizational and follow-through skills
- Ability to anticipate and solve problems
- Genuine curiosity and passion in the field of financial planning
- Model for all Prosperity Planning core values:
  - Hard Work
  - Positive Mental Attitude
  - Integrity
  - Team Player
  - Obsessive Commitment to the Client Experience

### We Offer

- A competitive hourly salary
- Housing reimbursement assistance for candidates from outside of Kansas City area
- Mentoring by experienced CFP® professionals
- A collaborative team environment
- The opportunity to utilize every talent you have!

**About Prosperity Planning, Inc.**

Our Mission: To help high net worth individuals and business owners create a simple path to a better life through our Prosperity Planning Blueprint™ process.

We are an independent fee-only Registered Investment Advisor firm located in the Briarcliff business development, just minutes from downtown Kansas City. Our success for the past eighteen years has been driven by our commitment to placing our clients' interests first; providing innovative, holistic planning and investment management.

**To apply:** Send resume and cover letter to [dan@prosperityplanninginc.com](mailto:dan@prosperityplanninginc.com)