



# FINANCIAL PLANNING INTERN

## ROLE DESCRIPTION

### Role Title

Intern

Financial Planning

**Reports To** Chief Strategy Officer

Launch your career in financial planning with LVZ's CFP® track internship experience; a hands-on opportunity designed for motivated college students eager to earn experience hours toward the Certified Financial Planner™ credential. Gain exposure to the full spectrum of financial planning, from client discovery to investment management, while being exposed to the operation of a registered investment adviser (RIA) firm.

Ideal for students from freshman to junior level, this internship empowers future advisors to develop real-world client advisory and practice management skills within our firm while focusing on what matters most – building relationships and delivering meaningful outcomes for our clients.

This opportunity builds on the asynchronous, CFP-endorsed Externship curriculum offered by Amplified Planning, complemented by bi-weekly in-person experiences throughout June, July, and August. Participants who complete the Externship can earn 500 CFP Board Standard Pathway hours and 180 AFCPE® experience hours toward certification. Additionally, you may choose to complete an eMoney certification.

## WHAT YOU'LL DO

- Participate in Amplified Planning's The Externship cohort with learning modules, assignments, live events, and earn industry credit hours for further credentialing
- Develop and maintain a solid understanding of industry compliance, reporting metrics, organizational structure, programs and controls, client and financial planning process of an RIA
- Learn about LVZ's portfolio offerings and client messaging
- Activate brand presence at both internal and community events

## WHO WE WANT ON OUR TEAM

- Effective communicator - visual, written, and oral
- Attentive to the smallest details; willing to identify errors and take steps to rectify
- Demonstrated organizational skills; self-motivated; able to prioritize and meet deadlines
- Proficiency in Microsoft programs, creative programs, CRM systems, and ability to quickly learn new software
- Welcoming persona that is respectful to a diverse spectrum of clients and colleagues
- Desire to deliver experiences that supersede expectations

**LVZ operates on five non-negotiables that define the culture of our team. You are the right culture fit if you...**

- Foster a welcoming and respectful environment for team members and clients.
- Create extraordinary client experiences that exceed expectations.
- Operate on a foundation of integrity and clear communication.
- Pioneer new ideas and processes as a result of perpetual learning.
- Give generously of time, talents, and treasure to serve our communities.

**Start Date**      May 2026  
**Hours**            15-20 hours per week in summer 2026  
**Salary**           Gas reimbursement for in-person experiences

#### **ABOUT LVZ**

Since our founding in 1960, LVZ has remained constant in our mission to deliver peace of mind for whatever comes next in every aspect of our firm. We started as a small firm that sold mutual funds - since then, we have expanded to manage multi-million-dollar portfolios and offering comprehensive financial planning services. Our firm has grown to manage over \$1 billion in assets across the country. Learn more about us at [www.lvzinc.com](http://www.lvzinc.com).

#### **TO APPLY**

Visit <https://lvzinc.com/join-our-team> to submit your application via the form at the bottom of the page. A resume and cover letter are required as part of the application.