ROLE DESCRIPTION

Financial Planning Intern

TEAM

Wealth Management

REPORTS TO

Chief Strategy Officer

SUMMARY

We are looking for a motivated student who is ready to learn the craft of financial planning from inside a fiduciary advisory firm.

This internship is built for undergraduates pursuing CFP® certification who want a summer that counts toward both the certification and the career. You will follow a client relationship from discovery through planning and investment management, while learning how a registered investment adviser (RIA) operates. Amplified Planning's virtual Externship curriculum anchors the experience, paired with bi-weekly in-person work alongside our advisors in June, July, and August. Success looks like an intern who finishes with practical skills, completed experience hours, and a clear sense of whether this profession fits.

WHAT YOU'LL DO

- Participate fully in Amplified Planning's Externship cohort, completing the modules, assignments, and live sessions required to earn the program's experience hours.
- Build a working understanding of how a registered investment adviser operates — organizational structure, the client and financial planning process, reporting metrics, compliance programs, and internal controls.
- Observe the financial planning process end to end, from client discovery through plan delivery and investment management.
- Learn LVZ's portfolio offerings and client communication standards.
- Support LVZ's presence at internal and community events.

WHO WE WANT ON OUR TEAM

- Currently enrolled undergraduate student, freshman through junior standing preferred, with a clear interest in building a career in financial planning.
- Effective communicator — visual, written, and oral.
- Attentive to the smallest details; willing to identify errors and take steps to rectify them.
- Demonstrated organizational skills; self-motivated; able to prioritize and meet deadlines.
- Proficiency in Microsoft programs; comfort with creative tools; able to learn new software, including CRM and financial planning systems, quickly.
- Welcoming persona that is respectful of a diverse spectrum of clients and colleagues.
- Desire to deliver client experiences that exceed expectations.

POSITION DETAILS + BENEFITS

START DATE	May 2026
HOURS	10–15 hours per week, summer 2026, including bi-weekly in-person experiences in June, July, and August
COMPENSATION	Gas reimbursement for in-person experiences
BENEFITS	• Participation in Amplified Planning's Externship, the virtual, asynchronous curriculum at the center of this internship • 500 CFP Board Standard Pathway experience hours and 180 AFC® experience hours through AFCPE®, awarded upon completion of all required program elements • Optional eMoney certification • Direct exposure to LVZ advisors, operations, and compliance throughout the summer

OUR FIVE NON-NEGOTIABLES

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

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

ABOUT LVZ

Since our founding in 1960, LVZ has remained grounded in a singular purpose: delivering peace of mind for whatever comes next. What began as a small firm offering mutual funds has evolved alongside the lives and financial complexities of the people we serve.

Today, LVZ provides comprehensive financial planning and investment management, overseeing more than $1 billion in assets and serving clients through a nationwide network of advisor partners. While the depth of our capabilities and reach has grown, our commitment remains unchanged: thoughtful guidance, deeply personal relationships, and a coordinated approach to helping clients navigate the intersection of their lives and finances.

Learn more about us at www.lvzinc.com.

SUBMIT YOUR APPLICATION

Please submit your resume and a cover letter telling us why this role and our team are the right fit for you. Applications are reviewed as they arrive, and we will follow up with next steps.

lvzinc.com/join-our-team