



5250 Elvas Avenue  
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## Financial Planning Internship

- Description:** Paid, entry-level internship to provide hands-on introduction to financial planning. Duties include document scanning and organization, initial data entry into financial planning software, assist in meeting preparation and post-meeting follow up, prepare agendas and reports, confirm trades, document processes and other operational tasks as needed. There may be an opportunity to sit in on client meetings, as well. This is an excellent opportunity to learn first-hand from an experienced Certified Financial Planning® Professional.
- Soesbe Financial is a rapidly-growing, independent firm focused on fee-only personal financial planning and investment management for high net worth individuals. Our passion is helping people improve their lives; we do this by bringing clarity to our client's finances and helping guide their decisions about money.
- Requirements:** Junior or Senior standing at a Financial Planning educational program.  
GPA 3.0 or higher in relevant coursework.  
Meticulous attention to detail; strong written and verbal communication skills.  
Ability to precisely follow written and verbal instructions and procedures in English.  
Experience with MS Word, Excel, and Adobe Acrobat.  
Able to work independently, mature, friendly, outgoing, and dependable.  
Strict adherence to company privacy policy and other security procedures.  
Drug and background screening required upon acceptance of any offer and before beginning internship.
- Duration:** 8-10 weeks, average 6-8 hours per week during typical business hours (M-F, 9-6)  
Work hours are flexible and can be scheduled around class/exam calendar.
- Compensation:** Hourly wage \$21 - \$24, depending on experience.
- Location:** Soesbe Financial, 5250 Elvas Ave, Sacramento, CA 95819  
*This position is in-office and is not eligible for remote work.*

***Please e-mail your resume to [careers@soesbefinancial.com](mailto:careers@soesbefinancial.com) along with a non-AI cover letter explaining your interest and highlighting your qualifications***

Soesbe Financial is a woman-owned, Hispanic, LGBTQ and veteran-led company.  
We are proud to be an Equal Opportunity Workplace.  
Diversity candidates are especially encouraged to apply.