Position Description

Title: **Summer Intern -**

Reports to: Valerie Sausaman – Senior Client Service Representative
Kristen Watson – Senior Financial Planner
Assigned Financial Advisor Mentor in Respective Office

Who is SYM?

SYM Financial Advisors is an independent Registered Investment Advisory (RIA) firm that delivers client focused investment and financial planning solutions. SYM serves as a trusted expert to our clients, using our team's deep knowledge and vast experiences to be an advocate and help them achieve their vision of financial success. We are seeking a responsive, motivated, and detail-oriented team player to join our firm for the summer. We are excited to offer a 12-week rotational internship program designed to give students an inside look at the wealth management profession and the many teams that make SYM thrive. Interns will rotate through multiple departments – including Qualified Retirement Plan Services, Financial Planning, Financial Advising, Client Service, Human Resources, Marketing, IT, Accounting, Compliance regulated by the SEC, Investments, and Trading – gaining a holistic understanding of the financial advisory industry.

Internship opportunities are available at our offices in:

- Winona Lake, Indiana (headquarters)
- Fort Wayne, Indiana
- Indianapolis, Indiana
- Mishawaka, Indiana
- Midland, Michigan

To learn more about our company, visit this link: [SYM Financial. Who We Are. (youtube.com)](youtube.com).

What does this role entail?

Interns at SYM will go beyond observation – they will participate in meaningful projects, client-facing exposure, and skill-building opportunities. Throughout the internship you can expect to:

- Work 40 hours/week on-site
- Rotate through key departments to learn how each area contributes to the client experience and firm operations
- Job shadow advisors and team members, including the opportunity to attend select client meetings

- Assist with meeting documentation, supporting the creation of advisor meeting notes that serve as a vital part of client recordkeeping
- Engage in mock investment portfolio competition, collaborating with peers to research, select, and monitor individual securities
- Complete a capstone project, acting as a financial advisor in a mock scenario to demonstrate the skills you've developed throughout the summer
- Participate in a StrengthsFinder workshop to better understand your professional and personal strengths and how to apply them in a team setting

This program is designed to provide interns with a well-rounded experience that blends technical knowledge, interpersonal development, and professional growth.

What are we looking for?

Must Haves:

Successful candidates for this program are curious, motivated, and eager to learn about financial services. While no prior industry experience is required, we are looking for students who demonstrate:

- Academic Standing: College sophomores and juniors currently enrolled in an undergraduate program with a 3.0 GPA or higher (Finance, Accounting, Business, Economics, Financial Planning, or related field preferred)
- Analytical Mindset: ability to think critically, analyze data, and solve problems.
- Strong Communication Skills: Clear and professional verbal and written communication skills, with the ability to interact comfortably in team and client-facing situations
- Attention to Detail: organized, accurate, and conscientious when handling information
- Team-Oriented: willingness to collaborate, contribute, and learn from colleagues across different departments alongside the other interns
- Adaptability: open to new challenges and able to adjust quickly in a dynamic, professional environment
- Professionalism & Integrity: a high level of responsibility, confidentiality, and respect for clients and colleagues

What's in it for you?

- Interns will be paid an hourly wage, to be determined during the onset of the program
- Client-facing experience
- Professional development through the StrengthsFinder workshop and mentorship from experienced advisors and planners
- Potential advancement opportunities – interns who excel may be invited to return for a Phase 2 internship the following summer to provide a deeper focus within either the Financial Advising or Investment Planning team
- Pathway to full-time employment. While not guaranteed, interns who demonstrate strong skills and cultural fit may be considered for a future full-time position after graduation, depending on firm needs