LUMA WEALTH

Luma Wealth Advisors Re-Internship (2017)

Luma Wealth Advisors is seeking a 'Return to Work' intern (a Re-Intern) in our Cleveland, Ohio office beginning January 2018.

What is a Re-Intern?

A Re-Intern is someone who has experienced prior career success in the financial services industry, has been voluntarily out of the workforce for at least two years, and now wants to "on-ramp" to the wealth advisory business. The Re-Internship will last for 6 months and the successful Luma Wealth Re-Internship may lead to a full time position working towards becoming an advisor to high net worth individuals and families.

The Re-Internship is an opportunity to work closely with a dynamic and innovative team at a leading financial planning and wealth advisory firm. During this time, the intern will gain invaluable experience in terms of understanding the financial planning process and analysis, portfolio management, client relationship building, implementation, trading, thought leadership, marketing, business development and more. The position will focus on hands-on learning as well as education and includes professional, technical and administrative work.

To find out more about Luma Wealth Advisors, visit www.LumaWealth.com. Luma Wealth strongly believes in the value of internships to both interns and the companies that sponsor them. Our goal for this program is for the Re-Intern to be prepared to launch a successful and fulfilling career in the wealth management advisory business.

What the Re-Internship Looks Like

The Re-Internship is a paid, six-month, full-time position, beginning on January 15, 2018.

This position will include three types of work:

- Work that provides the Re-Intern with hands-on learning about how to be a financial planner while supporting the work Luma Wealth Advisors does for its Clients.
- Work in support of the Re-Intern's learning and growth, such as participation in professional meetings and organizations, attending unique educational and social events, access to industry leaders and resources and individual mentoring.
- Work in support of Luma Wealth's day-to-day operations, such as database management and administrative responsibilities.

Duties will vary and evolve over time, but will include:

- Financial plan and update preparation for Client meetings and participation in Client meetings.
- Actively working with financial planning software, Emoney, and scenario building with clients. (e.g. research, financial planning software input and report generation, data consolidation in support of financial planning projects, onboarding clients to software and maintenance, etc.)
- Participation in niche market events
- Projects around building content for niche markets
- Business Development support (e.g. analyzing and tracking Client base data, developing metrics and dashboards, researching new markets and opportunities, etc.)
- Attending and contributing to Client Relationship team meetings, advisor team meetings and ad-hoc project teams.
- Client Service support (e.g. preparing paperwork, etc.)
- Administrative responsibilities (e.g. scanning and filing, answering phones, Client digital folder clean-up, system updates for SEC compliance, etc.)
- Data entry, database clean-up, maintenance, and quality control

Requirements

Applicants must:

- Hold a Bachelor's Degree or higher
- Have been voluntarily out of the workforce for at least two years
- Be looking to enter the financial planning profession and be enthusiastic about participating in the financial planning/wealth advisory community
- Be trustworthy, ethical, hard-working and professional
- Demonstrate excellent written, verbal and technical skills
- Be detail-oriented and able to manage tasks and projects through to their successful conclusion
- Have strong relationship building skills and the desire to leverage your life experiences to relate to clients and help them achieve their goals
- Enjoy working as part of a team as well as be able to work effectively and efficiently on their own
- Have a strong desire to learn and grow

LUMA WEALTH ADVISORS

Our Core Purpose: Inspiring Families

At Luma Wealth, we understand that every woman has unique needs and challenges. We listen to what our clients have to say, then provide them with personalized, respectful and tailored solutions to help meet their wealth planning goals. Luma Wealth clients work with advisors who are experienced and credentialed. They are industry leaders who guide women through all of life's stages.

Our Target Client:

- NE Ohio
- Age 40 +
- $2-$25mm in net worth
- *They are in transition, value advice over product, delegator but want to be in charge, too busy looking for clarity, philanthropic-sense of gratitude, concerned about family stewardship, respectful-professional, want a relationship*

Our Three Unique Offerings:

- *Comprehensive wealth advice and education for the whole family*
- *Focused on niche markets where we have distinct knowledge and experience*
- *Financial Quarterback-Proactive and collaborative advice from a team of advisors*

We strive to learn the important and often sensitive details of our client's lives, goals, aspirations and concerns so we can most effectively and comprehensively manage their financial needs.

Clients benefit from a broad range of wealth services. Our counsel is fee-based, which means we do not receive transaction commissions or accept third-party compensation. It means advisors who are free to be objective, to think independently and are not confined to any set of products. It means customized solutions suited to the client's needs and aligned with client goals.

We help clients and their families navigate life's expected and unexpected events. Clients turn to us for confidence when planning for a child's or grandchild's education, assuming inheritance, buying or selling a business, coping with the death of a spouse or adjusting to changes from a divorce. We offer sound advice and support before, during and after any significant life transitions.

PROCESS

Resume and cover letter may be sent to careers@lumawealth.com no later than November 15, 2017.

Cover letter should include an essay of 500 words or less on:

- Why do you want to become a financial planner (be sure to distinguish "financial planner" from other advisors in the financial services industry)?
- Why do you want to work for Luma Wealth Advisors?
- What would you need from the Luma Wealth team to reach your highest potential?