

*Summer Internship Announcement*

*May – August 2022*

**Overview**

Wealth Enhancement Group (WEG) was founded in 1997 by four advisors with an essential belief: The financial services industry needed a new and better way to serve clients—one that would provide everyone with the kind of specialized advice that’s typically reserved for the family offices of the ultra-wealthy.

They sought to deliver unbiased, truly comprehensive advice by using their complementary skill sets in financial planning, investment management and tax strategies. This powerful combination formed the foundation of our team-based approach we call the Roundtable™. This dynamic team of advisors and specialists serves all ranges of wealth—from CEOs and successful entrepreneurs to hard working savers—covering all aspects of wealth management, including financial planning, retirement income planning, tax strategies, investment management, estate planning and insurance.

Our team has expanded over the years through strategic acquisitions and organic growth, with more than 1,200 employees in over 75 offices, but our unique team-based approach remains the same. We’re committed to working together to provide customized, holistic advice, and we believe that our Roundtable™ team delivers better results than one single financial advisor can offer. More than 12,000 clients across 40 states entrust us with approximately $57 billion in assets, and our client retention rate exceeds 97%.

In 2021, WEG acquired Carroll Financial Associates, a $4.5+ billion registered investment advisory firm in Charlotte, North Carolina. Carroll Financial was founded in 1980 by Larry Carroll with the philosophy that “The best interest of the client is the only interest that matters.”

**Qualifications & Terms of Employment**

* Proficient in Microsoft Word, Excel, and Power Point
* Student in good standing within financial planning coursework
* Work experience in or out of the financial planning industry
* Quick learning skills and a desire to engage in financial planning
* Competitive hourly pay will be offered depending on candidate’s background and ability

**Summer Intern Position**

Wealth Enhancement Group’s summer internship provides you with opportunities to learn about the financial planning industry and gain hands-on experience. You will have the chance to observe how several independent veteran financial advisors and teams do business within our firm. The key to our program is flexibility. We allow you to actively engage within the various sectors of financial planning that interest you the most and add value to our firm by improving a process, assisting with client relationship management, or completing a meaningful project.

As an intern at Wealth Enhancement Group, you will have the opportunity to spend your summer working with several independent financial advisors and learning about our business directly from financial advisors.

**Goals and Objectives:**

* Meet with financial advisors weekly to review progress, gain feedback, and ask questions
* Rotate weekly amongst “host” teams to learn their business model
* Attend lunch with different advisors for insights into the business
* Attend client meetings to gain hands-on experience
* Learn the backgrounds and career insights of multiple expert advisors
* Increase industry knowledge as well as software, communication, and professional skills

**Responsibilities:**

Actual responsibilities will depend on your specific capabilities but may include:

* Complete assigned personal project(s)
* Assist with client events
* Help with daily tasks based on the needs of advisors
* Complete necessary administrative duties (making copies, binding presentations, covering the front desk, stocking the refrigerator, refilling copiers, and printers, etc.)
* Be flexible to help any advisor or team complete tasks and projects regardless of “host” team

**Application Process**

Our interview process will begin with first round phone interviews starting in late October/early November.

If you would be interested in interviewing with us, please send a resume and cover letter to:

**Emily Ward**

[eward@wealthenhancement.com](mailto:eward@wealthenhancement.com)

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