



## Position Description

**Title:** Intern

**Reports to:** Director of Advisory

**Benefits:** No

**Status:** Seasonal – Summer Intern

## About Meridian Financial Partners

Headquartered in Warrenton, Virginia, Meridian Financial Partners provides holistic financial solutions to individuals and organizations nationwide. The firm offers deep expertise and services in investment management, financial planning, and strategic integration of financial resources.

Meridian is one of the rare few that offers unique guidance and solutions to help clients create and manage a clear financial path to their life goals. The firm's partners have earned the unwavering trust of many long-term clients, who enjoy financial peace of mind as a result of the knowledge, customized care and—most especially clarity—that Meridian consistently delivers.

## Program Overview

Meridian's goal for its summer internship program is to provide interns with an immersive experience of the client side of financial planning and investment management. Over the course of the summer, interns are trained in client services, client onboarding, marketing, financial planning, and investment management, and are given the opportunity to learn from and observe a variety of advisors and their different approaches.

This is a hands-on, educational experience designed for students interested in pursuing a career in financial planning and wealth management. The Summer Intern plays a meaningful role in supporting the Advisory and Investment teams while gaining practical exposure to Meridian's fiduciary, client-first approach.

We are looking for someone with the following skills and characteristics:

- Strong attention to detail
- Organized and process-oriented
- Analytical and comfortable working with data
- Professional and service-minded
- Curious, eager to learn, and proactive
- Able to handle confidential information with discretion

## About You

You are a motivated student exploring a career in financial planning, investment management, or a related field. You are detail-oriented, dependable, and take pride in producing accurate work. You enjoy learning new systems, asking thoughtful questions, and contributing to a team environment.

You value professionalism, integrity, and the opportunity to observe and support experienced advisors serving clients in a fiduciary capacity.

## Job Description and Responsibilities

The Summer Intern will support the Advisory and Investment teams and have the following responsibilities:

- Learn operational functions and act as a liaison with custodial firms
- Update client accounts in the client data management system
- Enter and analyze data within financial planning and investment management software
- Assist with the paperless office system (scanning, shredding, and appropriate document handling)
- Build personal financial statements for financial planning clients
- Assist in the preparation of comprehensive financial plans, including:
  - Retirement projections
  - College funding plans
  - Life insurance analyses
- Monitor Required Minimum Distribution (RMD) dashboards
- Create investment portfolio presentations and assist with Investment Policy Statements
- Learn to use the portfolio management system for client investment accounts, including:
  - Tracking performance
  - Evaluating accounts for rebalancing
  - Suggesting rebalancing strategies
- Assist with SIMPLE Plan rebalancing

Throughout the internship, you will have opportunities to observe client meetings, advisor collaboration, and internal planning discussions to better understand the full client experience.

## Qualifications

- Currently pursuing a Bachelor's degree in Finance, Economics, Business, or a related field
- Strong academic record
- Proficiency in Microsoft Excel and familiarity with financial concepts preferred
- Interest in pursuing a career in financial planning or investment management

## Salary and Benefits

- Summer Internship Program – 8 weeks starting June
- Part-time, paid internship