**Summer Intern Position at IIS Financial Services**

Seeking College Senior or Recent College Graduate

**Company/Organization:** IIS Financial Services, South Portland

**Schedule:** 10-20 hours per week for the summer, M-F, depending on office workload

**Projected Start Date:** May 31st, 2022

**Wage/Salary:** $20.00 per hour

**Who is IIS Financial, and what we're looking for:**

IIS Financial Services is a full-service wealth management firm specializing in investments, retirement, and estate planning. As independent financial advisors, our job is to help our clients by providing objective, knowledgeable, and personalized financial guidance throughout all phases of life.

We are seeking a motivated individual with a strong work ethic looking for a career and profession that involves sales and marketing with the ability to have ownership and autonomy.

**Job Description:**

1. Engage with the team as a critical player with marketing projects, copywriting, monitoring website, and enhancing our client experience through technology
2. Assist Client Services with servicing tasks such as making beneficiary changes, address changes, and name changes.
3. Prepare for client meetings by providing the necessary paperwork, and after those meetings, enter the data collected.
4. Prepare clients for eligibility with our online portal
5. Perform administrative tasks such as data entry of spreadsheets, mailings, and other clerical duties.
6. Provide administrative support by answering phones and transferring calls to the appropriate team member.

**Qualifications:**

1. Demonstrated working knowledge of Microsoft Outlook, Word, and Excel. Basic computer knowledge required, intermediate experience a plus.
2. Excellent communication skills, both verbal and written.
3. Excellent interpersonal skills.
4. Ability to work in a professional business setting.
5. Resourceful to be a self-starter, plan work for the day, and work with limited guidance.
6. Highly organized and attentive to details.

**Application Instructions:** Submit cover letter and resume via e-mail to retire@iisfinancial.com