

## Position Description

**Title:** Financial Services Intern - Onboarding

**Reports to:** Onboarding Manager

**Salary Range:** \$16.50-\$20.00 per hour (depending on location)

**Benefits:**

- Paid sick leave – 1 hour earned for every 40 hours worked.
- Not eligible for employer-sponsored health benefits.

NWAM, LLC dba Northwest Asset Management is committed to fostering, cultivating, and preserving a culture of diversity and inclusion. Diverse and inclusive teams have a positive impact on the services we provide our clients and advisors. We embrace and encourage our employees' difference in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and other characteristics that make our employees unique. Military veterans and spouses are highly encouraged to apply. NWAM, LLC dba Northwest Asset Management is an SEC Registered Investment Adviser.

## Job Summary

The Financial Services Intern is focused on supporting the back-office operations in the Onboarding department. This individual will gain real-world experience of working in the financial services industry, particularly related to the back-office operations of an investment management firm. Interns will receive training on different types of accounts and forms used in the investment industry, as well as the cycle of financial advisors starting and maintaining their business and clients. This position will use a variety of computer programs including Microsoft Office products, CRM, and custodian platforms such as Fidelity and Charles Schwab. Interns will receive initial and ongoing training, participate in goal-setting objectives, and be provided performance reviews during their internship.

## Duties and Responsibilities

- Assist Onboarding team with the onboarding of new advisors and their clients.
- Prefill documents and send out DocuSign's ensuring accurate completion.
- Follow-up on documents sent via DocuSign.
- Perform NIGO resolutions in a timely manner and reach out to advisors as necessary.
- Maintain open communication between Onboarding team and other departments.
- Process assigned tasks in a timely manner.
- Work directly with custodians and service teams.
- Participate in team transition calls as necessary.
- Other responsibilities as assigned.

## Requirements and Qualifications

- Solid strategic thinker and problem solver.
- Strong organizational and project coordination skills with the ability and experience to handle and prioritize multiple assignments and conflicting deadlines, while providing a high level of client service.
- Ability to work effectively under pressure with tight deadlines, with attention to detail, and the ability to handle conflict and negotiate resolution.
- Ability to be responsible for confidential and time sensitive material.
- Proficiency with Microsoft Office products such as Word, Excel, and Outlook is required.
- Excellent written and verbal communication skills – clear, concise, and organized.
- Ability to work in a team-based environment, proactively covering and sharing task responsibilities with other team members.
- Be self-motivated, show initiative and creativity in all aspects of work (e.g. creating new methods to streamline tasks).
- Work independently with little supervision and knows when to ask for guidance, clarification, assistance.
- Possess a high level of professionalism, confidentiality, discretion, and judgment.
- Desire/ability to work successfully in a small company environment.