

Internship

About Physician's Resource Services:

Physician's Resource Services continually strives to make financial planning easier for physicians and their families. For decades, PRS has worked with physicians to help them transition from residency to practice and prepare for retirement. PRS's daily objective is to save our clients valuable time by reducing their hours spent planning and organizing their finances. Our team of advisors offers guidance in each core element required for a comprehensive financial plan: insurance, investment, tax, and legal – all working together as one team. Our goal is to give clients back their time, allowing them to be a better doctor, spouse, parent, and friend.

Job Description:

(THIS ROLE IS REMOTE) We are dedicated to helping physicians and other professionals create effective income protection and wealth accumulation strategies. We are seeking 2-4 interns for Spring of 2022 to help support, grow, and be a great addition to our financial planning team. The intern will be exposed to financial planning meetings, investment meetings, and PRS underwriting team. We are very supportive and provide a friendly, caring, and dedicated working environment for great people. Knowledge of planning areas including financial planning, investments, budgeting, taxes, risk management and estate planning will be developed over the course of this internship.

This is a paid internship role

Primary Tasks:

- Attend client meetings with advisors and take notes
- Gather and maintain client data
- Enter client information and notes into various systems, including financial planning and CRM
- Assist the Operations and Investment groups with client onboarding
- Schedule meetings for advisors
- Answer routine client questions and service requests
- Communicate with other PRS team members

Our ideal candidate should also have the following skills:

- Attention to detail with strong analytical skills
- Able to handle a high volume of work with an extreme attention to detail

- Has a genuine interest in serving and caring for other people
- Has excellent organizational, task, and time management skills
- Likes to work proactively — not reactively
- Solves problems with long-term solutions
- Comfortable with spreadsheets and databases
- Has excellent interpersonal skills
- Ability to prioritize tasks effectively
- Ability to work independently
- Must have the ability to learn and retain information about procedures, clients, and related information
- Preferably a Junior or Senior

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Visit our website at <https://physiciansrs.com>