

Internship for Spring of 2023:

About Physician's Resource Services:

Physician's Resource Services 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 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, wealth accumulation, and tax strategies. We are seeking 1-2 intern(s) for the Spring of 2023 to help support, grow, and be a great addition to our advisor team. The intern will be exposed to financial planning meetings, life and disability meetings, investment meetings, and PRS underwriting team. We are very supportive and provide a friendly, caring, and dedicated working environment for great people. PRS has hired an intern to a full-time position, for the last several years.

Knowledge of 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:

- Contact physicians for consultations with advisors.
- 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 (Salesforce).
- Assist the Operations and Investment groups with client onboarding.
- Schedule meetings for advisors.
- 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.
- Is comfortable making outbound calls to schedule meetings...
- Comfortable with spreadsheets and databases.
- Has excellent interpersonal and follow-up 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>