

The Rice Partnership – Summer Internship 2020



The Rice Partnership

Wealth. Management.

Firm Information

Firm Name: The Rice Partnership
Street Address: 1304 Santa Rosa Street
City, State, Zip: San Luis Obispo, CA 93401
Website: www.TheRicePartnership.com

The Rice Partnership is a boutique wealth management firm with offices in San Luis Obispo, Honolulu, and Maui. We offer wholistic wealth management services including asset management, family office, and financial advisory services.

Internship Contact Information

Contact Name: Ashley Wilken, CFP®
Title: Senior Wealth Manager
Phone: 805-517-4122
Fax: 805-517-4123
Email: ashley@thericepartnership.com

Position Description

Title: Intern
Reports to: Ashley Wilken, CFP®
Contact Information: ashley@thericepartnership.com
Dates: June 2020 – September 2020
Hours: 10 – 40 hours per week

Job Summary

The internship provides you with the opportunity to learn the financial planning and investment strategy aspect of the independent investment advisor business from the inside and help our clients meet their investment goals.

At the end of your internship, you should have exposure to some or all of the following areas:

- Asset allocation and investment research
- Financial service software applications
- Financial planning services including:
 - Education planning
 - Estate planning
 - Insurance planning
 - Tax planning
 - Retirement planning

Duties and Responsibilities

Under the supervision of Ms. Wilken, the Intern can expect to gain exposure in the following areas:

- Assist in the basic research/monitoring of existing assets and investment opportunities including the following asset classes: individual equities and fixed income securities, exchange traded funds, and mutual funds
- Prepare for client meetings including asset allocation, performance (quarterly, yearly, historical), benchmark/target performance comparisons, market overviews and trends as well as market sector performance and analysis
- Contribute to research under the supervision of the investment management team: Orest Saikevych, CIO and Tony Brizzolara, Portfolio Manager
- Assist with special projects (i.e. development of client content, economic scenario analysis study, development and production of special performance reporting formats for investment partnerships)
- CFP® Certification Mentorship and Preparation tips, as requested.

Qualifications

The Intern position typically requires the following qualifications:

- Currently attending a college or university in a Bachelors or Graduate degree program preferably in an analytical or business discipline.
- Interested in a career in the independent investment advisory business and CFP® certification
- Proficiency with Word, PowerPoint, Excel, Outlook
- Strong written and verbal communication skills
- Client-first attitude
- Self-confidence, personal integrity and an understanding of fiduciary responsibility
- Ability to multi-task, manage time effectively, and work unsupervised
- Ability to maintain absolute confidentiality in dealing with client matters

- Strong financial analytical skills
- Self-starter, energetic, assertive
- Professional demeanor, team player, excellent people skills
- Desire/ability to work successfully in a small company environment
- Ability to work in the United States

Compensation

- \$15 - \$20 / hour

Application Process

To apply for this internship position:

- Submit your resume and cover letter to ashley@thericepartnership.com
- If you are selected from our resume review, you will be contacted for a phone interview.
- Applying for this position may require certain background checks. If you are selected from our resume review, more information is available from the Firm.

The Rice Partnership is an Equal Opportunity Employer

The above content is for general information only, and is not intended to provide specific employment, regulatory or legal advice. Schwab makes no representation about the appropriateness, accuracy, completeness or reliability of the information for any given situation. The content in this document is only an informational starting point which must be tailored to fit the context of your needs, objectives and circumstances. For further information and guidance, you should consult with your legal and human resources advisors.