



Wealth Management Intern

Fairway Wealth Management LLC provides clients across the United States with integrated wealth management and investment advisory services.

We are seeking a Summer 2025 Wealth Management Intern to support our wealth managers and operations team in delivering our full range of wealth management services, as well as assist on special projects. This is a paid position, but not eligible for employee benefits.

This opportunity will provide an in-depth view into the role of a wealth manager, with experiences that demonstrate the analytical, relational, and technical skills that are involved in providing wealth management services to high-net-worth clients. This role also offers hands-on experience and exposure to various departments including investment research, family office, and client service administration.

Duties include the following:

- Reporting to and shadowing Wealth Managers and Associate Wealth Managers
- Preparation and analysis of investment portfolio reports, Net Worth statements, and financial planning worksheets
- Inputting data into cash flow planning software to develop financial plans and running Monte Carlo analyses
- Meeting with investment research, family office, and client service departments for shadowing and various task assignments
- Assisting on a variety of special projects in various departments within the firm
- Assisting with answering phone calls, sorting mail, and organizing office supplies
- Assisting with physical and digital file maintenance

Desired Qualifications/Skill Sets:

- Enrolled Junior or Senior level college student as of Fall semester 2025
- Major in Accounting, Finance, and/or Financial Planning
- Currently pursuing or thoughtfully considering CPA or CFP licensure
- Available for 8 weeks during Summer 2025, working 25 to 30 hours per week
- Cooperative mindset, with the ability to work independently and in a team setting
- Strong analytical and communication skills

If interested, please send your resume to Chis Martin at cmartin@fairwaywealth.com.