GV Financial

ADVISORS

Investment & Compliance Department Intern

Company Information

GV Financial Advisors is an Atlanta-based, privately-owned company that offers Guided Wealth Transformation™ to successful families. We seek to help our clients recognize their true desires and motivations in terms of lifestyle, retirement and legacy and then to develop realistic plans for realization of their goals. Bringing clarity to what our clients really desire, we are able to join together all of the different elements of financial planning into a comprehensive game plan devoted to achieving those ambitions.

There are four core values that serve as the guiding principles for everything that we say and do, both with our clients and our team members:

- ***We do what is right.*** We are guided at all times by the principles of ethics and integrity. We are honest not simply because it is good for business, but because it is the right thing to do.
- ***We do what is in our clients' best interest***. We serve as advocates for our clients. No one outside of family members will care more about our clients' financial futures than GV Financial Advisors.
- ***We strive to be more than fair.*** We set and maintain the highest standards in our relationships with our clients, other professionals, and our employees.
- ***We take responsibility for what we say and do***. Our clients place enormous trust in us and in our recommendations. We take that responsibility to heart and accept full responsibility for our actions and recommendations. Our job is to deliver the advice and services our clients expect and deserve. We know we only win when our clients win.

Position Information

The responsibilities for this position include

- Scanning correspondence and planning files into electronic records management database
- Updating mutual fund and separate account manager due diligence files
- Analyzing mutual funds held in outside accounts
- Preparing packets for Investment Committee meetings
- Conducting preliminary review of existing client portfolio's
- Using excel to create asset allocation pie charts
- Data entry of securities prices for tax reports
- Conducting preliminary compliance client file review
- Conducting annual account compliance review

Qualifications

- Junior or Senior in college majoring in Finance or related field
- Ability to work 24-37 hours per week
- Proficient in Microsoft Excel
- Pleasant assertiveness and ability to continue to follow up with Advisors until all necessary information has been gathered
- Ability to work on projects that require little interaction and consistent high level of detail-orientation

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