Kuttin Wealth Management

Spring Internship

Start – February 3rd date may be subject to change
End – May 15th date may be subject to change
Location – Hauppauge, NY
Hours - 8-12 weekly
Compensation - Unpaid
Academic Credit for internship – Student must contact school and go through approval process.

Ameriprise Financial – Ameriprise Financial has more than $875 billion in assets under management and is ranked 252nd on the Fortune 500 list. For more than 120 years, we remained true to our vision of putting our clients' interests first. We are passionate about helping you live the full and rich life you've earned. We offer comprehensive financial advice and a broad range of solutions to help you and your loved ones live brilliantly, now and in the future. Currently, Ameriprise has approximately 10,000 advisors serving clients nationwide. Ameriprise has achieved national recognition by Barron's, Financial Times, Forbes, and Working Mother. Integrity has been a core value since Ameriprise was founded in 1894. It's how, through panics, recessions, the Great Depression and the recent Great Recession, we've grown into a global financial leader. We've never lost our focus on our clients. That's who we are.

Kuttin Wealth Management – Kuttin Wealth Management is a Melville based wealth management firm with over $1 billion dollars under management and more than 1500 clients. For 2019, Kuttin Wealth Management has been ranked by Barron's as a top 100 Financial Advisor nationwide. Additionally, our firm is ranked by Barron's magazine as a top 100 Independent Financial Advisor nationwide, which makes it our 10th year in the Barons top 100 Independent Financial Advisor list! Our firm has also been ranked in Forbes Best-in-State Wealth Advisors list for the past two years. Our vision is to not only be known as a consistent Barron's Top 100 Wealth Management Firm, but to also be known industrywide as a supercharged Leadership Development practice. We see massive growth going into the future. Our purpose is to help our employees and clients attain happiness and become better human beings.

Your Impact - Are you the type of person with an entrepreneurial spirit who sets high standards and strives for excellence? Do you have a passion for finance and helping people? At KWM we aim for greatness, we want every member of our firm performing at their highest potential. During your internship, you will have the ability to directly impact our company's future success by completing your various responsibilities. We are looking for top students who will thrive in our culture where communication, ambition, focus, integrity, and leadership are paramount to our growth.

Our Impact - Our interns will receive a wide range of training/learning opportunities such as leadership development training, sales training, and product training. You will have the opportunity to learn from both in-person and program-based training. Additionally, your direct interaction with seasoned employees will provide enormous potential to learn important lessons and receive powerful advice that you can use going forward in your professional life.

Your responsibilities may include –

- Partake in intern orientation
- Improve processes and systems of the firm

- Contact existing clients to schedule meetings
- Research business growth opportunities (new/existing)
- Assist co-workers with client related activities
- Participate in team meetings and training sessions
- Shadow client meetings with experienced advisors
- Assist team members in completion of projects
- Complete various training/education programs
- Be involved in preparing and executing client and prospect events, dinners, and seminars
- Preparing and/or designing meeting agendas, forms/applications, and other visual aid materials for upcoming client meetings
- Preparing and/or designing meeting agendas, forms/applications, and other visual aid materials for upcoming client meetings

Learning Objectives -

- Strengthen in-person and phone communication skills by interacting with clients and co-workers
- Develop planning and organizational skills by assisting co-workers with client related tasks
- Develop effective leadership skills
- Enhance time management and multi-tasking skills
- Attain a deeper understanding of the financial planning and wealth management industries
- Attain experience in working with a professional team
- Become more familiar and comfortable in a professional workspace environment

Please contact Scott Hlatky at scott.hlatky@ampf.com if you are interested in this position.