Summer 2024 Internship Opportunity

Do you want to learn more about private wealth management and personal finance at a growing company?

This 10-week paid internship program is a great opportunity to explore a career in private wealth management. The program allows interns to learn the basics of the wealth management business with exposure to investment management, financial planning, wealth management (client facing), operations (money movement and account setup), and marketing (business development campaigns). Two to four projects are completed that further refine the detailed work we do for clients.

The objective is for the intern to gain a solid feel for the different tracks that can be pursued in the wealth management business and, depending on hiring needs and performance, may apply for a full-time, entry-level role upon completion of a bachelor's degree.

The ideal candidate will be entering their senior year of college, possess strong organizational skills and have a demonstrated interest in personal finance. Candidates should exhibit a keen eye for detail, a strong drive, a positive attitude, a thirst for learning, and a commitment to upholding Heritage's core values of teamwork, integrity, and excellence.

Proficiency in Microsoft Excel is required.

The internship will take place in-person at our office in Westwood, MA.

Interested candidates should submit a resume and a cover letter to careers@heritagefinancial.net