

Financial Planning Intern
Geographic Focus: In-Person or Remote
Dates: June 2, 2025 – August 8, 2025

Introduction to Zenith

Zenith Wealth Partners (Zenith) is a wealth management firm on a mission to combat racial, age based, and gender wealth inequality by delivering comprehensive, high quality, and accessible advice to individuals, business owners and institutions. We believe that wealth management does not have to start only when a client has accumulated significant wealth. Zenith works with its clients to evaluate the best financial decisions while giving them back time and peace of mind.

Position Summary

As a member of the 2025 Summer Intern Class, Zenith is seeking a part-time Financial Planning Intern to join its team. This position has a target of 20 hours per week and the opportunity to work additional hours as approved. The role is remote-first with an option for in-office desk space if the applicant lives in Philadelphia. Reporting to a member of the Individuals and Families team, the Financial Planning Intern will be responsible for the following:

- Partner with a Financial Planner to build profiles, reports, and statements for clients to reach financial planning milestones.
- Establish and update client balance sheets and income statements
- Manage client onboarding, meeting scheduling, follow up, and deliverable timelines
- Coordinate with Zenith's service partners such as accountants and attorneys
- Engage in research on new laws and financial planning techniques

Desired Knowledge & Skills

- Rising Junior or Senior at an accredited institution
- Exceptional communication skills
- Proficient with Microsoft Office, Google Drive
- Demonstrated experience or coursework in finance or economics
- Detail-Oriented - You sweat the small stuff and take pride in your work
- Client-Centric – You love building authentic relationships

Compensation & Perks

Zenith embraces a high-performance culture and seeks to reward employees that deliver exemplary results. The position will earn \$18.75/hour for the duration of the internship. This role does not accrue paid time off; however, you will be entitled to all NYSE holidays and time off for your birthday.

Zenith provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics. In addition to federal law requirements, Zenith complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities.

Next Steps

You are ready to jump on board and wondering what to do next. We would love to hear from you. Applicants will be reviewed on a rolling basis and should [complete this brief questionnaire](#).