

## **LPL Financial**

2 Park Plaza

Irvine, California, 92614

<http://www.stratosca.com/>

### **COMPANY DESCRIPTION**

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LPL Financial is one of the leading financial services companies and the largest independent broker/dealer in the nation\*. For more than four decades, the firm has served as an enabling partner, supporting financial advisors in their goals of protecting and growing their clients' wealth. A chief objective of LPL Financial is to reduce the complexity of running a financial services practice so advisors can focus on what they do best help their clients attain their financial goals and fulfill their dreams.

\* As reported in Financial Planning magazine 1996-2014, based on total revenues.

### **DUTIES & RESPONSIBILITIES**

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As an intern for LPL financial, students will be engaged in the daily operations of the financial management industry. Interns will receive training from seasoned financial professionals in various segments of the financial world including but not limited to: day to day operations, portfolio design and maintenance, financial planning, as well as many other miscellaneous office duties. Students will receive hands-on experience dealing directly with clients and prospects under the supervision of financial professionals. Students will participate in weekly learning seminars that will cover a broad range of topics. By the end of the internship students will have the basic knowledge needed to get a start in the financial planning industry.

### **QUALIFICATIONS & REQUIREMENTS**

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The following requirements must be met to be considered for the position:

- I. Strong communication skills
- II. Highly team-oriented
- III. Strong will to learn
- IV. Available 10-15 hours per week during the hours of 09:00am to 05:00pm.

### **TIME COMMITMENT**

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These are the requested periods of time by the employer

- 1-term (50-100 hours/10 weeks)
- 2-term (50-100 hours/20 weeks)
- 3-term (50-100 hours/30 weeks)
- 1-summer term (50-100 hours/5 weeks)
- 2-summer term (50-100 hours/10 weeks)

### **HOW TO APPLY & DEADLINE**

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Please send resumes to [agnes.lui@lpl.com](mailto:agnes.lui@lpl.com). Applications are accepted on a year round basis.

**CONTACT INFORMATION**

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For More information please contact Agnes Lui at [agnes.lui@lpl.com](mailto:agnes.lui@lpl.com) or 949-229-6210. You can also visit their website at <http://www.stratosca.com/>.