Mark Phillips & Associates

19712 MacArthur Blvd., Ste 225
Irvine, CA 92612
http://www.phillipswealthmanagement.com

COMPANY DESCRIPTION

We provide Comprehensive Financial Planning for Individuals. Our goal is to provide indispensable advice and assistance to clients that will help them to make depressions and take action best suited to supporting their 'Ideal Life".

DUTIES & RESPONSIBILITIES

Engage with Financial Planner to assist with:

- Collection of personal financial data
- Using web based financial tools for investment account aggregation and analysis of investment risk and potential return
- Input data into specialized Financial Planning software (MoneyGuidePro) and work with planner on optimization of variables to produce maximum probability of secure retirement spending
- Manipulate data on Excel spreadsheets to provide add'l analysis on variety of financial decisions: buy/lease, Annuitize vs Lump Sum distribution, IRR on specific investments, estimated tax basis

QUALIFICATIONS & REQUIREMENTS

Study in the area of Economics and Finance, hunger to learn through work, and motivated.

TIME COMMITMENT

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)

HOW TO APPLY & DEADLINE

Contact me at (949) 333-6394, or mark@phillipswealthmanagement.com. Year round deadline dependent on availability.

CONTACT INFORMATION

For More information please contact Mark Phillips, at 949-333-6394 or admin@phillipswealthmanagement.com. You can also visit their website at http://www.phillipswealthmanagement.com.