

Pacific Capital

1811 California Ave, Suite 101

Corona, Ca, 92881

pacificcapital.com

COMPANY DESCRIPTION

We are an exclusive and independent company that provides financial life management advice to families and business owners. We protect and grow our clients' wealth so they can enjoy their hard-earned success. Client relationships are personal and important to us; we strive to provide a Ritz-Carlton service experience with Fed-Ex efficiency. Our core purpose is to help clients ENJOY LIFE by removing their stress about money.

DUTIES & RESPONSIBILITIES

- Assist in the process of gathering, organizing, and entering client materials into multiple planning programs
- Help create comprehensive financial reports and identify solutions for clients to better protect or grow their wealth
- Contribute ideas to improve efficiency in communication within the team and with clients
- Provide research assistance in a variety of areas, including investments, economic issues, business development
- Assist in creating and using various software programs for client reports

QUALIFICATIONS & REQUIREMENTS

- Have an eager interest in learning more about the financial management industry
- Initiate a positive attitude and general optimism for life and enjoy being part of a team
- Have excellent organizational and time management skills to efficiently manage several projects simultaneously
- Follow through from beginning to end and have great attention to detail
- Are able to work autonomously, follow instructions, and take initiative to complete projects
- Knowledge and experience using Microsoft Office (Word, Excel, PowerPoint)
- Strong skills in verbal and written communication (web, email, letters)
- 3.25 GPA or better at your University

TIME COMMITMENT

These are the requested periods of time by the employer

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

HOW TO APPLY & DEADLINE

Email cory@pacificcapital.com a copy of your resume, college transcript and a brief cover letter. Applications are accepted year round.

- Cover letter should answer the following questions:
 - What are your goals for your internship?
 - Why would you like to intern with Pacific Capital?
 - Internship openings are few in number compared to all the students who want the experience. Why are you an excellent fit and a valuable internship candidate for our firm?

CONTACT INFORMATION

For More information please contact Nate Fowler at nate@pacificcapital.com or 844-777-8777. You can also visit their website at pacificcapital.com.