



Financial Planning Intern *Boone, NC*

THE OPPORTUNITY

Sterling Wealth Advisors® is seeking a Financial Accounting Assistant for an 8-week independent contractor (1099) position in Boone, NC. This is an excellent opportunity for students or recent graduates interested in financial planning, investment management, and tax strategy. You will gain hands-on experience in a collaborative, client-focused environment while working closely with experienced financial professionals.

INTERNSHIP DETAILS

- Hours: 30-40 hours per week
- Duration: 8 weeks
- Location: Boone, NC (We will host you during your time here.)

WHAT YOU'LL DO

- Assist in preparing financial planning materials, including estate planning summaries, investment analyses, and retirement projections.
- Support client meetings by organizing materials and taking notes on key decisions and action items.
- Participate in tax-planning and tax-return review meetings with our CPA partners.
- Research financial planning topics, tax strategies, and investment solutions.
- Assist with administrative tasks and data organization to improve client-service processes.

WHAT WE'RE LOOKING FOR

- Current student or recent graduate in Financial Planning.
- Strong computer literacy, including Excel and Word, and basic 1040 tax knowledge.
- Interest in pursuing Series 65, CFP®, CFA®, EA, CKA®, or other relevant certifications.
- Excellent organizational skills and attention to detail.
- Strong communication and problem-solving abilities.
- A passion for helping clients achieve financial success and a willingness to learn.

To apply, please submit your resume and cover letter to Lanette@SterlingWealthAdvisors.com.

About Sterling Wealth Advisors®

Sterling Wealth Advisors® is a fee-only fiduciary firm specializing in financial planning, retirement planning, investment counseling, and tax strategy. We are committed to helping clients align their financial decisions with a fulfilling and purpose-driven life. We do not sell products and only work for our clients.