

## Internship Search Guide | Financial Planning

### CSR 48000 Course Description

Supervised internship in the financial services industry. The experience will enable students to develop their professional interest and skills, gain valuable industry training and develop industry contacts. A **total of 140 work site hours** are required along with completion of all CSR 48000 academic assignments and supervisor evaluations. Register for CSR 48000 in the semester you are working your hours. Pre-requisite: Must be a financial counseling & planning major; completion of CSR 34200 with a grade of D-

### Suitable Job Sites

The appropriate position is one that involves a service or product related to a consumer's financial counseling and/or planning needs. Examples include financial planning firms, employee benefit companies, investment firms, insurance companies, trust departments, financial counseling agencies or government services such as the Social Security Administration. Paid and unpaid positions are accepted. Unpaid positions must provide formal documentation of work hours, verified by your supervisor. The company or organization may be for-profit or not-for-profit. Self-employment is not acceptable for this requirement. If you are uncertain of the acceptability of a position, discuss it with your academic advisor or the current course supervisor. Geographic/physical work location is unlimited as all academic assignments will be submitted through Brightspace.

### Job Search Tips:

The department does not place students into internships but we provide numerous resources. Securing an internship is part of the student learning experience and requires some focused attention on your part. These tips will get you started and help you with your search:

- Start with writing your **resume** and having it proofread by more than one person. Templates and resources are found on the [CCO Career Success Handbook](#)
- Draft your skeleton **cover letter** to later populate with information for specific roles. Use the [CCO Career Success Handbook](#) for examples and best practices
- Register with [myCCO](#). Ensure your profile is accurate and settings are correct so you are alerted to matches. Review "MyCCO Tips" for best results.
- Start a list of target organizations linking to your careers page. Create a schedule where you also check the CCO job postings weekly for new positions/postings
- Refer to a list of Career Fairs on the [CCO Website](#) to meet recruiters and arrange interviews
- Set up your **LinkedIn** profile and actively utilize it:
  - Include an appropriate, business type headshot (search: "Tips for the perfect LinkedIn profile picture")
  - Be sure your headline clearly states what you're looking for
  - Make sure you edit your Job Seeking Preferences within your Profile Settings. Click on "Signal your interest to recruiters at companies you've created job alerts for"

- Connect with past employers or professors and seek professional references for your LinkedIn profile and/or list of references
- Connect with people who have the job you are interested in
- Join Groups such as Purdue Alumni Association; FPA (your city); CFP Board
- Check out the [HHS Career Development](#) website and connect to the HHS Career Newsletter
- View the [4 Years to Career Success: Steps to Explore your Major & Interests](#) checklist
- Bookmark the [HTM Ray Kavanaugh Career Center](#) website for up to date info about the School of Hospitality Career Fairs and networking opportunities
- Watch for Advisor emails with internship announcements – these usually come from alumni (the perfect connections)!
- Set up a Google alert for positions you’re interested in
- Google search what you are looking for! (i.e., “finance internship Chicago” – or “financial planning internship near me” – or – “paraplanner internships Houston”)
- Cold call companies you’re interested in or visit the “Employment” or “Careers” links on company websites
- Make sure your friends and family are aware of your internship needs and what you are looking for as many opportunities arise through acquaintances (“who you know!”).
- Read local business or trade publications (ex: Inside Indiana Business; [Financial Planning Magazine](#) to identify industry/business sector trends that may impact hiring.
- Visit the [CFP.net](#) Career Center; consider registering for a personal CFP account
- Use the [Purdue Career Research Portal](#) through Purdue Libraries. There are a wealth of links and databases here!
- Explore alternative entry-level positions that are looking for individuals with your skill set. “Widen” your net of potential jobs; positions you may not have normally considered. Think more broadly about your transferrable skills and potential starting positions. A starting point might be the [Occupational Outlook Handbook](#)

## What is Required of a Potential Employer?

Employers must be willing to submit a midway and a final evaluation of your on-site work. These documents are part of the Employer Packet you will give to your supervisor at the time he/she signs your Site Approval Request Form. If a company is not able to complete the evaluations for you, you will receive 0 points for that portion of your grade. Additionally, while this is mentioned in the Employer Packet, it is a good idea to remind your employer that as an intern you will be writing reflections and a final paper that may require you to ask for assistance with obtaining company information pertinent to your research.

## Recent Financial Planning Internship Experiences

Anthem, Inc.  
August Wealth Advisors  
Boiler Financial Track  
Cetera Financial Group  
Charles Schwab Edward Jones

FPA Virtual Externship  
The Fountain Trust Co.  
Key Bank  
Mariner Wealth Advisors  
MSI Group, Hong Kong

OneIndiana Financial Group  
Northwestern Mutual  
Stifel Investors  
Source One, Inc.  
Vanguard



School of Hospitality and  
Tourism Management