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| |  |  | | --- | --- | | **2025 Summer Internship** |  | |

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| **Company Profile** |
| |  |  | | --- | --- | | |  | | --- | | PlanMember Financial Corporation is a financial services firm with a national footprint, and headquarters in Carpinteria, on the beautiful Central Coast of California. Serving the public sector for over 25 years, PlanMember has been a top ranked fee-based broker-dealer since 2004, ranked #4 in new plans added and #8 for all K-12 plans. PlanMember’s unique membership model helps employees achieve their retirement goals by providing institutional level investing solutions and delivering exceptional service and support to both employees and their employers. PlanMember’s mission is to make a positive difference for our Partners, PlanMembers and Employees, every day. To accomplish this, we’re looking for highly motivated candidates to join our growing team. | | |

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| **Location and Hours** |
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| **Wage Band** |
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| **Job Summary**  As an intern at PlanMember, you will have the opportunity to gain hands-on experience in the financial services industry and contribute to meaningful projects that impact our organization. This internship program is designed to provide you with valuable insights, and a chance to develop essential skills that will benefit your future career. You will work closely with our team(s), learn from experienced professionals, and be exposed to various aspects of our industry. |

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| **General Responsibilities:** |
| Internship Duration: June - August |
| |  |  | | --- | --- | | |  | | --- | | * Project Support: Assist in ongoing projects by conducting research, gathering data, and providing administrative support. * Learning and Development: Participate in training sessions, workshops, and coaching programs to enhance your skills and knowledge. * Collaboration: Work collaboratively with team members and cross-functional teams to achieve project goals and objectives. * Problem Solving: Contribute to problem-solving initiatives by offering fresh perspectives and creative solutions. * Documentation: Maintain accurate records, reports, and documentation related to your projects and tasks. * Presentation: Prepare and deliver presentations on your project’s findings or related topics. * Ad-Hoc Tasks: Assist with various ad-hoc tasks and assignments as directed by tour supervisor/manager. | | |

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| **Department Specific Responsibilities:** |
| To be Determined based on Department you are assigned to, such as:   * Service Center * Operations * IT * Compliance * Sales * Investments * Marketing * Finance * Human Resources/Facilities |
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| **Business Continuity** |
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| **Competencies Required** |
| |  | | --- | | * Enrolled in a relevant bachelor’s or master’s degree program. * Accountability. Strong enthusiasm for the financial services industry. * Organizational Citizenship * Learning Desire to learn and grow. * Excellent communication and interpersonal skills. * Proficiency in relevant software and tools (i.e., Microsoft suite, AI, etc.) * Quality Focus. Extended Tax Focus. Detail-oriented and organized with the ability to manage multiple tasks. * Adaptability and a willingness to take on new challenges. * Initiating Action. Eagerness to contribute to a dynamic team and organization. * Time management * Compliance. Confidentiality. | |

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| **Benefits:** |
| |  |  | | --- | --- | | |  | | --- | | * Learning Experience: Gain practical experience of the financial services industry. * Coaching/Mentorship: Receive guidance, coaching and mentorship from experienced professionals. * Networking: Build valuable connections within the industry. * Exposure: Get a glimpse into the workings of a real-work workplace. * Potential for Future Opportunities: The internship may lead to further career prospects within PlanMember. | | |
| |  | | --- | | **Licenses and/or Certifications Required** | | |  | | --- | | None | | |
| |  | | --- | | **Additional License and/or Certification Information** | | |  | | --- | | None | | |
| |  |  | | --- | --- | | |  | | --- | | **Position Information:** This is a Full Time Non-Exempt ((Hourly) Position located in the Carpinteria, CA Headquarters. | | |

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| **EEOC** |
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