

FULCRUM CAPITAL

Marketing and Financial Planning Intern

Seattle, Washington

April 15, 2019

Company Description

Founded in 2007, Fulcrum Capital, LLC is an independent Registered Investment Advisor headquartered in Seattle. Our clients are individuals, families, foundations and companies who seek a more thoughtful approach to investing. Our clients choose Fulcrum because they want to know what they own and be confident that their holdings align with their values. Our clients and team members value our independence, transparency and thought-leadership, particularly in the realm of sustainable investing. We value diversity and support work-life balance. Our firm is 100% employee-owned and majority women-owned.

Responsibilities include:

- Supporting advisors with projects and initiatives related to marketing, financial planning, and client communications
- Learning financial planning and CRM platforms for basic data entry, record management and client reporting
- Assisting in the firm's social media and digital marketing presence

As a successful candidate, your qualifications include:

- Finance, Marketing, Business Administration, Economics, or related major finishing your sophomore or junior year of college in May/June 2019
- Ability to work approximately 30-40 hours per week during the summer
- Candidate should possess a team-oriented mindset and must be comfortable accepting assignments from a variety of people
- Excellent work habits, detail-oriented, strong organizational skills, and the ability to prioritize tasks and manage workflows
- Must possess the flexibility and willingness to perform various ad-hoc assignments
- Willing to ask for help when needed
- Strong analytical and problem-solving skills
- Excellent written and oral communication skills
- Proficiency in MS Office Suite (PowerPoint, Excel, Word) required,
- Experience with WordPress desired

We welcome inquiries, resumes, and applications via email only to info@fulcrumcapllc.com.

Fulcrum Capital, LLC is an equal opportunity employer and is committed to providing a work environment that is free of discrimination and harassment.