



BLB&B Advisors, LLC  
FINANCIAL GUIDANCE SINCE 1964

## 2025 Financial Planning Summer Internship

BLB&B Advisors is seeking a motivated self-starter to assist with financial planning activities as the firm continues to expand its Plan. Invest. Succeed.® service offering for clients.

Founded in 1964, BLBB is an independent, employee-owned, fee-only, multi-custodial financial advisory firm providing fiduciary advice, planning, and investment management services to individuals and families, endowments, and business owners. We believe financial planning and asset management are dynamic, life-long processes designed to accommodate unique situations and goals. BLBB offers the capabilities of a larger firm coupled with the personal attention of a boutique practice. We believe our attention to detail, wealth of experience, and broad perspective enables us to deliver customized and comprehensive financial planning resources to our clients in an effort to help them, in turn, make better financial decisions, avoid taking on unnecessary risk, and feel in better control of their financial futures.

**Opening:** 10-week summer internship in our office located in Montgomeryville, PA. Interns work 35 hours per week and are compensated hourly. This is a great opportunity for those interested in pursuing the CFP® designation to gain hours needed for the experience component of the CFP® certification.

### **Qualifications:**

- Financial Planning major going into their senior year
- Completion of *Introduction to Financial Planning* prior to the start of the internship
- Strong work ethic, attention to detail and organizational skills
- Comfortable with technology, solid understanding of computer software
- Interest in financial planning with the goal of becoming a CERTIFIED FINANCIAL PLANNER™
- Excellent communication, teamwork, and client service skills
- Professionalism and confidentiality

### **Key duties, responsibilities, and learning objectives:**

- Assist with financial planning related projects
- Process high volume of data entry for creation of client financial plans
- Assist CFP® professionals in the development and presentation of financial plans to clients and prospective clients
- Review and update client information for the Plan. Invest. Succeed.® process
- Participate in our weekly Research and Investment Committee meetings

APPLICATION DEADLINE OCTOBER 31, 2024

Email resume and completed [application](#) to [interns@blbb.com](mailto:interns@blbb.com). Qualified candidates will be interviewed on a rolling basis as applications are received.

PLAN. INVEST. SUCCEED.®

