



Role Title: Financial Planning Internship (Paid)

Location: Remote, with occasional meetings at the Portland Blue Water Wealth office

About Blue Water Wealth: Blue Water Wealth is a women-owned, women-led team of activist asset managers and financial planners. Our managed investment portfolios focus on Sustainable, Responsible and Impact (SRI) investments. Our approach seeks to create more opportunities to generate wealth in ways that align with values for a better world and supports prosperity for all.

Position Description: We are seeking an initiative-taking individual who is ready to learn about financial planning, work on projects to support our team of advisors and observe how we build and enhance our client relationships. We value growth and stamina.

Responsibilities: People in this role will be responsible for serving as a scribe for client meetings, create follow up tasks, and manage special projects, as assigned. Intern will report to an advisor who will provide guidance and training.

Interpersonal Qualifications:

- Demonstrate active listening skills.
- Exhibit strong organizational abilities.
- Provide examples of past leadership experience.

Education/Technical Qualifications:

- Strong typing skills.
- Well versed in Microsoft Office including, Excel, Word.
- Must have hours of availability that fall between Tuesday – Friday, 8 a.m. – 5 p.m.
- Preference given to junior or senior in college.

Compensation: \$18.69/hour.

Application Process:

If interested, please email a resume and cover letter to positions@bluewaterwealth.com and use “Financial Planning Intern - Portland” in the subject line of your email.

In the cover letter, please explain your interest in this position. We will respond within five business days.