

# THE EXTERNSHIP



**FOR YOU AND  
YOUR STUDENTS**

AMPLIFIEDPLANNING.COM



@AMPLIFIEDPLANNING

## About the Externship

**The Externship is a 100% virtual and asynchronous summer program that lets your students see financial planning in action.**

**June 3–July 26**

**Time commitment of 20–25 hours a week. All majors welcomed.  
\$350. Scholarships available.**

### **Externs:**

- Become certified on eMoney Advisor
- Earn 180 CFP Board Standard Pathway experience hours
- Earn 180 AFCPE® experience hours
- Watch interviews with 50+ experts from across the country
- Sit in on real client meetings
- Participate in live Q&A sessions
- Create client deliverables and receive feedback
- Network with leaders and fellow participants
- Need no prior experience

### **The Externship at a glance:**

- Week 1 – Onboarding
- Week 2 – Cash Flow Planning
- Week 3 – Investment Planning
- Week 4 – Retirement Planning
- Week 5 – College Planning and Student Loans
- Week 6 – Insurance Planning
- Week 7 – Estate Planning
- Week 8 – Tax Planning

The Externship began in 2020 as a solution for college students who lost their financial planning internships because of COVID. Five years later, The Externship continues breaking the barriers-to-entry into financial planning, and reimagining education and training for financial planners. The 3,200 Externship alumni are comprised of college students, career changers, first-generation college students, veterans, early- and mid-career planners, and others in the industry. Many firms now consider The Externship a pre-requisite for new planners.

The Externship is a true learning experience. There is no selling, no cold calling, and no reviewing products or services.

# Our Partners



Our Supporters: BLX Internship Program, Diversitas, Association for Financial Counseling & Planning Education®, and Financial Planning Association®

# The Externship in the News



VETTAFI ADVISOR PERSPECTIVES  
The Future of the Externship Program



FINTECH FINANCE NEWS  
eMoney Advisor Partners with Externship Program for Aspiring Financial Planners for Fourth Consecutive Year



YAHOO! FINANCE  
The Externship, announces registration is open



RETHINKING65  
Program Offers Exposure to 50 Financial Planners



WEALTH MANAGEMENT.COM  
Virtual Externship Offers Pathways for the Next Generation of Financial Planners



KITCES.COM  
Best Practices For Running A Financial Planning Internship Program



WEALTH MANAGEMENT.COM  
Meet the Externs



WEALTH MANAGEMENT.COM  
Hannah Moore on Embracing Your Why

# A Note on Experiential Learning from our Founder



I am confident that my own internships played a significant role in sealing the deal in my decision to become a financial planner. Internships gave me the opportunity to try the work for myself and “peek behind the curtain” into the financial planning profession. And so in 2020, when COVID caused firms to rescind internship offers to students across the country, I knew that something had to be done.

The Externship was originally envisioned as a one-year solution. But it turns out that we created an accessible pathway for students, career changers, and early-career financial planners to experience what it’s like to be a financial planner. Now considered a leading training company in the financial planning space, **Amplified Planning is committed to tearing down the barriers-to-entry within this profession.** We’ve identified that gaining experience is the greatest of those barriers.

Some students join The Externship as part of their traditional internship or even as part of a summer school course. However, many students come to us because they will never have a traditional internship because they can’t afford to stop their jobs for the summer.

**The Externship provides an immersive experience where your students can see what a career in financial planning actually looks like.** They will watch real client

meetings, learn from financial planners with diverse clientele, and do the work of real planners by creating client deliverables using industry-standard software.

We have two former teachers on our team who ensure our assignments, course structure, and quizzes comply with pedagogical and instructional design best practices. We’re committed to providing exceptional experiences to your students and to aid you in your mission of educating the next generation of financial planners.

Every year I say this, and every year it’s true: our Externs are phenomenal! As I interact with them, I see their passion, the talent and skills they bring to their careers, and the strong motivations that compel them to this profession. If the Externs represent the future of our profession, we’re in good hands. The Amplified Planning team is here to help equip students and faculty. If you have any questions, please reach out!

*Hannah*  
Hannah Moore, CFP®

“ I signed up to test the waters for my **students**, but found that the experience was personally and professionally rewarding. – Marilyn Ettinger

“ The Externship was an enriching experience, **bridging the gap between textbook theories and real-world financial planning challenges**. This immersion into the practical aspects of financial advising, coupled with the networking opportunities, made the Externship a pivotal milestone in my professional journey. – Prudence Zhu

“ The Externship’s commitment to widening the reach of financial planning is multi-dimensional, thoughtful, and amazingly accessible. **Hannah is leading and growing an education-based, experiential ecosystem that fosters impactful connections between aspiring planners and seasoned ones**. As a curious learner herself, Hannah models key behaviors that ultimately benefit clients, planners, and the profession. – Ron Cohen

## Experiential Learning

In the last five years, students from more than **200 colleges and universities** have joined **The Externship**. The Externship’s 180 CFP Board Standard Pathway experience hours fulfill most schools’ internship requirements.



### For additional information

Marketing Director Sarah Warren joined Amplified Planning after more than a decade at a tier-one research university. Sarah serves as our university liaison. [sarah@amplifiedplanning.com](mailto:sarah@amplifiedplanning.com)

# Learn More By Exploring Data From The 2023 Externship



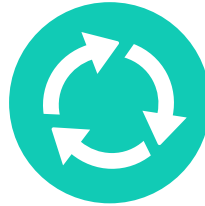
832

**Externs**



412

**Externship  
Finishers**



125

**Returning  
Externs**



62

**Scholarships  
Granted**



60

**Externs participated  
during a traditional  
internship**

**We asked the  
Externs what  
attracted them  
to the financial  
planning  
profession.**

They could select multiple answers.

13.09%

**STARTING SALARY**

15.2%

**DEMAND FOR JOBS**

35.6%

**TECHNICAL ANALYSIS**

50.4%

**PATH TO ENTREPRENEURSHIP**

65%

**WORK/LIFE BALANCE**

95.6%

**HELPING PEOPLE**

# Content Stats



179

Videos  
Produced



110

Hours of  
Recorded  
Material



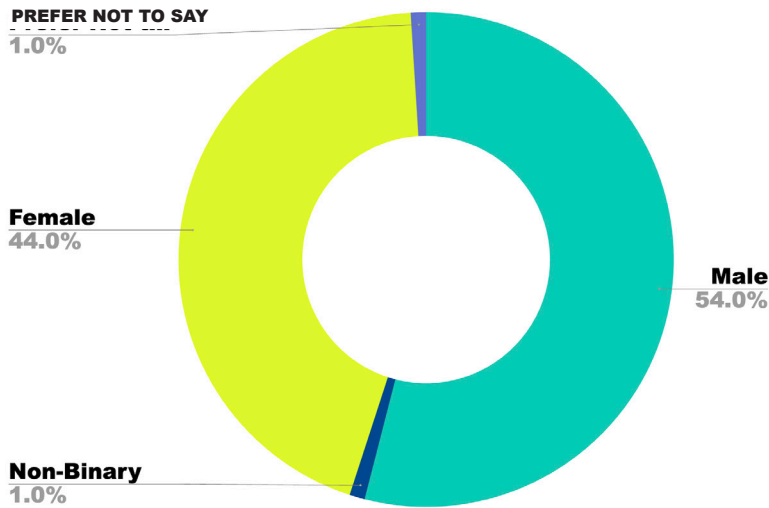
60

Presenters

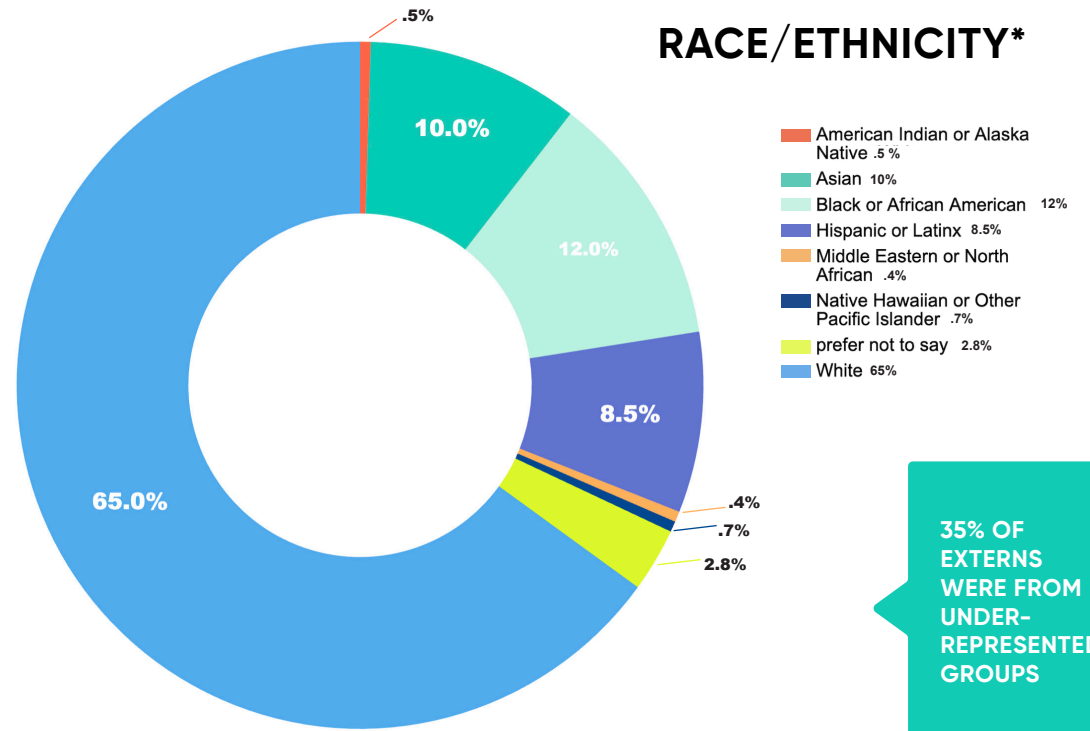


# Demographics

## GENDER\*



## RACE/ETHNICITY\*



35% OF EXTERNS WERE FROM UNDER-REPRESENTED GROUPS

“**The Externship is truly a representative of what diversity is all about.** I heard from young, middle age, older, black, white, Hispanic, men, and women all meshing together their ideas for a truly wonderful learning experience. Several Experts spoke about the under representation of black people in financial planning, from the client side. As a black woman who decided to switch careers to mainly help people like me, this content was very relatable. – Nicola Graham

\* COLLECTED FROM INITIAL EXTERNSHIP SURVEY † COLLECTED FROM SURVEY OF EXTERN FINISHERS



## NET PROMOTER SCORE<sup>†</sup>

ON A SCALE OF 1-10,  
HOW LIKELY ARE YOU TO  
RECOMMEND THE EXTERNSHIP  
TO A FRIEND OR COLLEAGUE?

9.56

“ For years I have asked to be a fly on the wall in client meetings. The Externship has provided a way to see how to truly review a client’s situation. **One summer in the externship can be worth more than your first year at a firm.** – Tricia Prehle

## Survey Data

“ There were so many small moments that together combined to form one large idea:

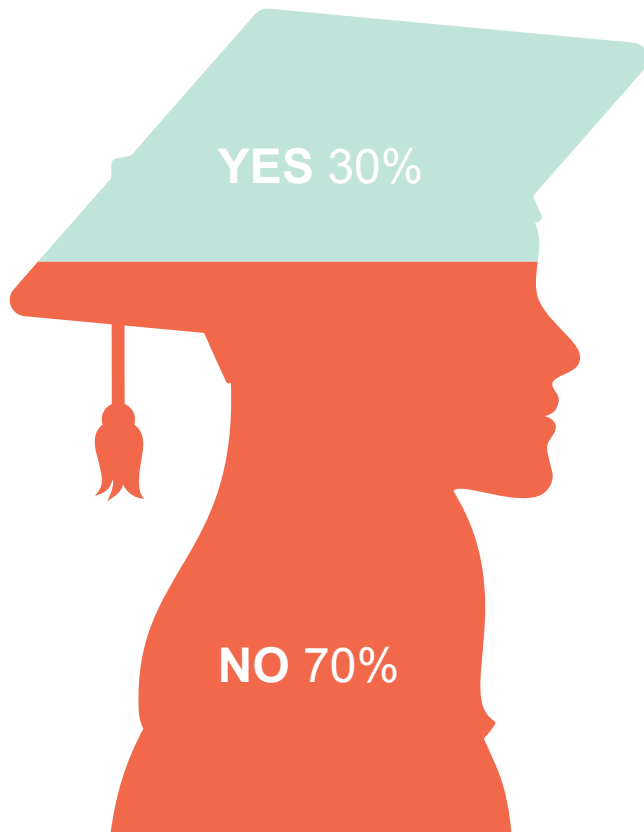
**Financial planning has and always will be about relationships.**

There are so many ways to go about it, but it should never be lost that you are dealing with a human being who has real emotions and opinions. – Aaron Hunt

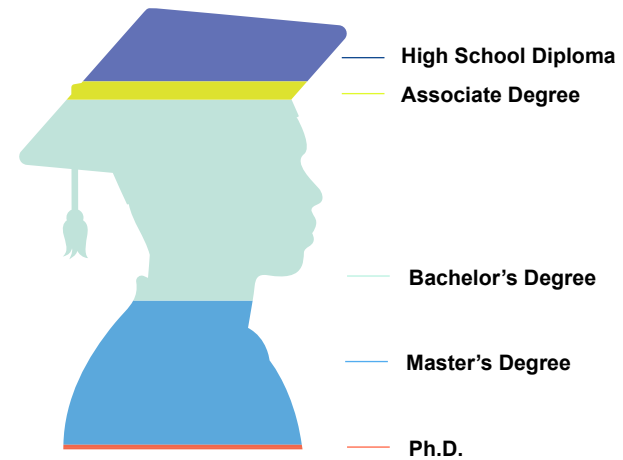


## Survey Data

ARE YOU A FIRST-GENERATION COLLEGE GRADUATE? \*



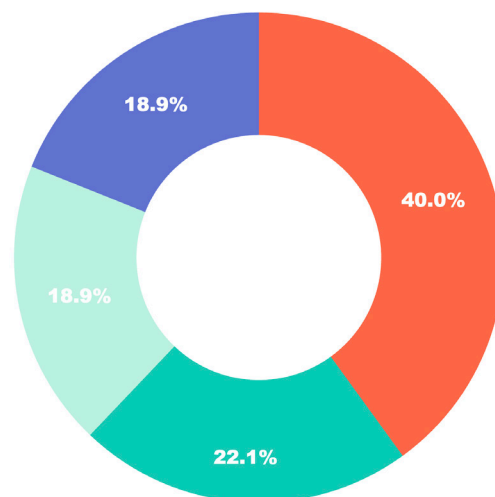
WHAT IS THE HIGHEST LEVEL OF EDUCATION YOU HAVE ACHIEVED? \*



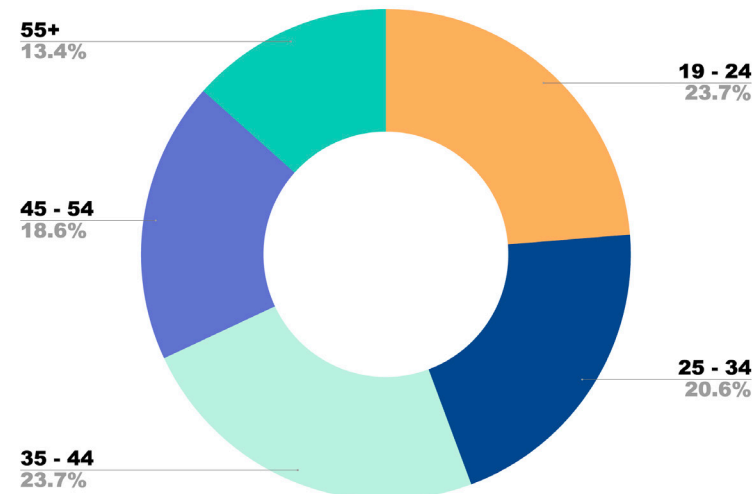
“ I must say **this has been by far the best financial planning course I have taken**, and that includes my college classes. – Joseph Hampton

## WHERE ARE YOU IN YOUR CAREER? \*

- Not in the profession/career changer
- Student
- Para-planner or otherwise involved in financial planning or financial services
- Planner



## AGE \*



**“The Externship is a life-changing event.**

– Amanda Salmons

**“** The Externship was eye-opening to the different career paths that exist within Financial Planning. It was interesting to hear the different strategies and approaches that the different planners took with their clients and practices. Lastly, **hearing the conversations with real clients gave a realistic perspective of how to be human on top of being a CFP®.** – Harmon Piatkowski

# The Keys to our Success

## **CURRICULUM DESIGN**

We use best practices in instructional design, ensuring a smooth learning experience for Externs.

## **PRACTITIONER LED**

Guest experts provide expertise and examples of deliverables to show the application of financial planning skills at work and in use.

## **COMMUNITY**

By placing a high value on community engagement initiatives, we've created a unique network of new and aspiring financial planners. This community is nurtured year round through special Extern Alumni events and Amplified Planning CORE.

## **OVERALL SURVEY OF FINANCIAL PLANNING**

By highlighting the differences and similarities among financial planning firms, Externs learn the ins and outs of the profession, and build a career path right for them.

## **PROFESSIONAL PRODUCTION STANDARDS**

Polished, professionally produced videos elevate the user experience.

## **TOP-TIER TALENT**

Experts with diverse backgrounds, firm types, clients, and regions make The Externship a unique introduction to the many facets of the financial planning profession.

## **INNOVATION**

The Externship fundamentally changed professional development for financial planners through innovative concepts like showing real client meetings and documents.

## **TECHNOLOGY PARTNERSHIPS**

Thanks to our partners, Externs use industry-standard technology platforms.

## **CFP EXPERIENCE HOURS**

Externs receive 180 CFP Board approved experience hours, which makes The Externship not only a learning experience, but a valuable step towards the profession that is breaking down barriers to entry to the profession.

## **LOW PRICE POINT**

By keeping the price of The Externship low, we are opening up an opportunity to explore the financial planning profession to people who have not before been able to consider it. This low price is only possible because of our partners.

# Why The Externship Matters

## EARLY CAREER INFLUENCE

The Externship helps provide confidence in Financial Planning as a career choice. Not only do new and aspiring financial planners get a better idea of what their career could look like, but they finish with excitement about it.

## TALENT PIPELINE

Externs finish the program passionate about a career in financial planning. Hiring managers are now looking for The Externship on resumes of prospective hires. The Externship is filling the talent pipeline.

## NETWORKING

Externs connect with big ideas, great experts, and with each other. All of this influences and promotes the greater financial planning community.

## INTERNSHIP SUPPORT

The Externship supports participating firms and their interns. This improves internship experiences and frees firms up to focus on other things.

## CONTINUED ACCESSIBILITY

The Externship continues to provide an accessible learning experience. This virtual and asynchronous program supports Externs wherever they might be in the world and in their career. Additionally, many Externs are career changers, including active military, who need to work during the program.

## IMPACT

The Externship is proven to have a lasting impact on people and their financial planning careers. We want to keep financial planners in the profession and increase their competencies.

WE HAVE

# big dreams for you

AND THE FINANCIAL PLANNING  
PROFESSION



## The Externship 2024

June 3-July 26

\$350. Scholarships available!

Learn more & sign up at [amplifiedplanning.com](https://amplifiedplanning.com)

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