

## Your firm's summer internship program meets the content, structure and expertise of The Externship.

Financial advisory and planning firms large and small want to make their interns' experiences relevant, structured, and valuable for both their firm and interns. Amplified Planning's Internship/Externship Program and Financial Advisory Firm Tool Kit is a framework for your firm's existing summer internship program.

### How the Internship/ Externship Program Works

1. **YOU** utilize our guides and tools to set up and map out your interns' summer internship.
2. **YOUR INTERNS** spend part of their workdays participating in the 8-week Externship program. They receive a certificate after completing each week's curriculum, which you may request.
3. **YOU** can use our prompts to create in-house learning opportunities that complement The Externship and enhance your interns' experience.
4. **YOU ALL** have a valuable summer internship experience!

### Benefits to Firms: The Financial Advisory Firm Took Kit

**BEST-PRACTICE CHECKLISTS** – We identify the experiences and skills your interns need to learn, and how and when you should introduce them.

**RECOMMENDED CADENCES** - What your interns should be doing daily, weekly, and at the start and end of their internships.

**WEEK-TO-WEEK GUIDE** - See what your interns are learning every step of the way. We'll provide you with exclusive suggestions on the types of supplemental materials, deliverables, and guest speakers you can provide to your interns each week. You'll get this early so you can plan ahead. Lunch and Learn, anyone?

**TWO VIDEO CALLS** - Begin and end The Externship with calls with other participating firms and The Externship team, and our founder, Hannah Moore, CFP®, and our Education Director, Lenard Dossey, who will offer additional best practices.

## All About The Externship

Over 8 weeks, from June 3 to July 26, Externs receive training from Hannah Moore, CFP®, and experts on a range of topics, from insurance and risk management to investment philosophies and tax planning. The flexible and virtual program involves a time commitment of about 20 hours per week. Each week, externs complete assignments and learn about different financial planning tools.

Since 2020, more than 3,200 future, new, and current financial planners have participated in The Externship. While The Externship began as an internship replacement in 2020, it has become an internship supplement. In 2023, 60 Externs participated in The Externship while taking part in traditional internships.

## Benefits to Externs

Access to eMoney and the opportunity to get eMoney certified at no additional cost.

180 experience hours towards the CFP® designation.

Advice and experience from more than 50 experts in different areas of financial planning.

# INTERNSHIP // EXTERNSHIP PROGRAM AND FINANCIAL ADVISORY FIRM TOOL KIT

## Price

\$1,500

Firm Support and the Financial  
Advisory Firm Tool Kit

\$350

Per Externship seat

## Learn More

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## Dates

The Externship runs from  
June 3-July 26, 2024

Commit to join the Internship/  
Externship Program by May 17

## Externship Schedule

Week 1 - Onboarding

Week 2 - Cash Flow Planning

Week 3 - Investment Planning

Week 4 - Retirement Planning

Week 5 - College Planning &  
Student Loans

Week 6 - Insurance Planning

Week 7 - Estate Planning

Week 8 - Tax Planning



**HANNAH MOORE, CFP®** founded The Externship in 2020 as a solution for college students who lost their financial planning summer internships because of COVID. The Externship is breaking 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 depth and breadth of the content, presenters/experts and tools/technology all exceeded any expectations. Additionally, being able to connect with/learn from my fellow peers was beyond helpful and normalized how I felt being a career changer.”

Kedisha Ebanks, Extern Alum

“It’s given me a broad overview of not only how I should think about the industry and what things I should be prioritizing, but also a fantastic overview of how the seasoned professionals of our industry think. How they want to hire, what they’re looking for, the words they use to describe planning, how they think about the profession both in a business context and as a lifelong passion.”

TJ Binkowski, Extern Alum

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