SHERWOOD
FINANCIAL PARTNERS

(m)Internship

Intern With Us!

At Sherwood, we believe wealth is a conduit for our values, and we exist at the intersection between financial markets and the personal legacies that our clients are building. Not coincidentally, many of our staff are Pepperdine alumni who bring a common mindset of both excellence and care to each and every one of our clients and their unique stories. You don't need to be a finance major to apply for this internship; however, an interest in building strong customer service skills and a desire to develop relationships alongside technical excellence in a professional setting will be positively looked upon.

- *Timeframe*: 10 Weeks - Spring 2027 (January-March) or Fall 2027 (September-November)
- *Hours*: Wednesdays 10 am - 3:30 pm (with 30-minute lunch break)
- *Paid*: $20/hr
- *Apply by date*: Friday, September 25th, 2026

Mini-internships at Sherwood offer students exposure to financial planning, portfolio management, operations, individual tax accounting, marketing, and estate planning in the wealth advisory space. Over the course of ten weeks, interns will have the chance to meet with a variety of professionals and learn more about how they provide value to the financial services marketplace as well as what their day-to-day work looks like. Students will have the chance to build and present their own financial plan, analyze our investment strategies, and interact with the various technology platforms of the firm (and, if the stars align, sit in on a client meeting or two).

Preferred Qualities:

- Detail-Oriented
- Reliable
- Task Driven
- Team Player
- Ability to problem solve and think critically in a self-paced environment
- Strong communication skills
- Strong social/emotional intelligence

- Growth mindset

Start dates vary based on the term chosen (spring or fall). You will report directly to Hannah Boundy, Managing Partner. To apply, please go to https://sherwoodfpforms.formstack.com/forms/m_internship_application and complete the application. The application closes Friday, September 25th. Selected applicants will be invited to interview.

Address:	Phone Number:	Email Address:
2475 Townsgate Rd. Ste. 210 Westlake Village, CA 91361	805.870.5591	info@sherwoodfp.com

Sherwood Financial Advisors is a Registered Investment Advisor serving high-net-worth and ultra-high-net-worth individuals and families out of our offices in Westlake Village, California and Broomfield, Colorado. Through our proprietary legacy-planning process, we help our clients visualize, plan, and communicate their legacy wishes. Our team goes beyond mere documentation to build a Legacy Plan combining comprehensive estate, investment, insurance, charitable, and tax strategies. Our firm is comprised of a close team of individuals with a breadth of knowledge and a passion for serving our clients to the best of our abilities, honoring the trust they've placed in us. Our mission is to help others build meaningful lives and do good in their communities with the resources available to them. We look forward to learning more about you and how you might lend your own unique insights and learning as one of our interns.