

*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 and structured, but may not have the curriculum or personnel to make that a reality. Amplified Planning's INTERNSHIP/EXTERNSHIP PROGRAM AND FINANCIAL ADVISORY FIRM TOOL KIT is a framework for your firm's existing summer internship program.

## ALL ABOUT The Externship

The Externship is the only online training program for future and new financial planners.

Over 8-weeks from June 5 - July 28, Externs receive training from a cadre of experts led by Hannah Moore, CFP® on a range of topics, from insurance and risk management to investment philosophies and tax planning. The virtual program involves a time commitment of about 20-hours per week.

Since 2020, more than 2,500 future, new and current financial planners have participated in The Externship.

**LEARN MORE: [WWW.AMPLIFIEDPLANNING.COM](http://WWW.AMPLIFIEDPLANNING.COM)**

## BENEFITS TO EXTERNS

- Access to eMoney and the opportunity to get eMoney certified at no additional cost
- 180 experience hours towards the CFP® designation
- Experience on other financial software applications, including Asset-Map, Income Lab, Morningstar and RedTail CRM.

## THE EXTERNSHIP IS FOR

- Students studying financial planning as a major
- Students curious about a career in financial planning
- Career changes
- Financial professionals looking for professional development, CE hours, or experience hours through the CFP Board.

## How the Internship/Externship Program Works

1. **YOU** utilize our guides and tools to set up and map out your interns' summer.
2. **YOUR INTERNS** spend part of their workdays participating in 8-week long Externship program.
3. **YOU** have the option to create in-house learning opportunities that compliment the internship and show off your firm.
4. **YOU ALL** have the best summer internship experience ever!

## What You Receive: The Financial Advisory Firm Tool Kit

**BEST-PRACTICE CHECKLISTS** – They will identify the experiences and skills your interns need to learn.

**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?

**A WEEKLY VIDEO FROM HANNAH** - A reminder on what's happening in The Externship this week, what your interns are learning, and a reminder on how you can supplement The Externships content this week.

**GROUP CALLS** with participating firms at the start and end of The Externship.

**AND MORE!**

# INTERNSHIP // EXTERNSHIP PROGRAM

## AND FINANCIAL ADVISORY FIRM TOOL KIT

### Price

Special inaugural-year Pricing Options

**\$5,000**

Includes 10 Externship spots

**\$3,500**

Includes 5 Externship spots

Special packages based on the size of your internship program are available on request.

### Dates

The Externship runs from June 5 through July 28.

Deadline to commit to be join the Internship/ Externship Program: May 24.

### Learn More + Join Program

Sarah Warren, Director of Marketing  
sarah@amplifiedplanning.com

## What Our Past Externs are Saying

### EXTERN testimonial

"This Externship is **the best thing I have done on this journey toward becoming a financial planner...**

It has allowed me to see financial planning in practice, make use of practical software, and really gain better insights into what it means to be a financial planner...**I LOVE the emphasis on the human relationship side of financial planning...**I am blown away by the quality of experts we have met during the Externship and all they can offer us on our journey."

Heike Lautenschlager

"You will learn a ton and make great connections. The opportunities that you will have to **interact with**, and ask questions of **some of the brightest minds in the planning** world are invaluable."

Jake Turner  
Externship 2022

"This should be a required program as **the content is priceless.**"

Gina Hagen  
Externship 2021, 2022 & Signed up for 2023

"The Externship **opened the door to the vast array of possibilities** available in the world of financial planning. I am so inspired to get going!!"

Stephanie Robson

"I believe **The Externship helped me gain my first position** as a Paraplanner.

I earned my CFP® in November 2022, and was promoted to Associate Financial Planner by the end of 2022."

Desiree Kaul  
Externship 2020 & 2021

"I had never seen financial planning in action. I got to be a fly on the wall during meetings. **There's a place for water cooler talk, mentorship, nuts-and-bolts how to, and inspiration all in one.** Best time and money ever spent."

**Make time for this now."**

2021 Extern

"It has **solidified my passion** for and desire to pursue my goal to become a financial planner."

Princess Franklin

## Thanks to our Sponsors

