

2027 Summer Intern

Company	Klaas Financial
Location	Loves Park, IL or Fitchburg, WI (<i>with occasional travel between offices</i>)
Position Type	Part Time Internship Duration: 8–12 weeks June 1-August 15, 2027, 20-24 hours/week

Klaas Financial Summer College Internship 2027 Opportunity

Here at Klaas, we believe that educating our clients is the first step in helping them understand their unique financial journey, and we embrace that same responsibility when it comes to college students and career-driven individuals, providing unique pathways and opportunities for **young professionals** to step into and learn about the financial services industry.

A previous Summer Intern here at Klaas discussed their experience: “Working alongside such a great group of “retirement professionals” provided me with an environment to learn so much more about retirement planning and running a company than I could have ever anticipated. But while the training, the teaching, and the opportunities provided were incredible, it was the tightly knit group of genuinely nice and caring people that I am most thankful for and will come to miss the most. “We’re seeking a **rising star** interested in the financial planning industry for our paid summer internship. This program offers hands-on experience, mentorship, and exposure to multiple areas of our firm.

What You’ll Learn:

- Financial Planning: Shadow advisors, assist with plan inputs, attend client meetings
- Client Services: Work with service associates, learn processing workflows
- Investments & Research: Portfolio design, trade execution, investment committee meetings
- Operations & Compliance: Documentation, risk management, technologies
- Plus, exposure to Marketing, Tax Planning, and 401(k) administration with an opportunity to complete a defined project during the internship.

Ideal Candidate

- Junior or Senior in college (with preferred major in Finance, Financial Planning, Business, Economics)
- Strong interest in financial planning/wealth management
- Excellent communication & organizational skills
- Willingness to travel between Rockford, IL and Madison, WI offices on occasion.

Details:

- This is a part time, non-exempt position with no benefits.
- This position does not offer visa sponsorship; candidates must be eligible to work in the U.S.
- This position will require a criminal background check.

For consideration for the Klaas Summer Internship program running from June 1 – August 15, 2027, kindly submit your resume, letter of interest in financial planning, and your career goals to info@klaasfinancial.com. You may include the following:

- Primary office location of preference
- Letter of recommendation from a teacher or employer.

We anticipate a high level of interest in this internship. To ensure the best fit, we will be conducting interviews with selected applicants beginning in late October 2026.

