Job Title: Client Engagement Intern  
Location: Philadelphia  
Hours required: At least 16 hours per week, we are flexible with scheduling.  
Reports To: Megan Kiesel, Director of Client Engagement  
Position Summary: The Client Engagement Intern is responsible for supporting the implementation and analysis of two client focus groups and otherwise supporting outreach and communication to Clarifi’s clients to facilitate appointments, gather information, or otherwise improve our operations.  
Qualifications:  
- The ability to initiate, maintain and follow-through with relationships is key to this position.  
- Excellent writing and interpersonal skills, highly organized and detail-oriented.  
- Knowledge of all Microsoft Office applications is essential.  
- Previous experience with financial education, social marketing, public speaking and event planning is a plus.  
- An energetic self-starter is preferred.  

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.  

Essential Functions:  
- Support the implementation of up to two client focus groups  
  - Recruit participants  
  - Manage RSVPs and reminders  
  - Oversee location booking and logistics  
  - Help with development of agenda  
  - Collect, analyze, and synthesize findings  
- Conduct outreach to clients to support the successful implementation of Clarifi programs  
  - Verify and confirm appointments  
  - Request additional information  
  - Recruit clients for Clarifi services  
  - Conduct outreach to clients to educate and inform them of services  
- Support other projects and programs as needed  

Additional Responsibilities:  
This position requires working with other Clarifi departments, and must work well within a team setting. Occasionally the individual must be able to work a flexible schedule and travel throughout the Philadelphia metropolitan area.  

Physical Demands:  
There are no special physical demands required by this position. The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.  

Travel  
Position is based in the Philadelphia Office. Minimal travel within requested territory by public transportation is expected.  

Work Environment:  
The environment for this position is a standard office environment. The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.