

Traditions Wealth Advisors

Financial Analyst Internship

Independently owned and operated, Traditions Wealth Advisors is a holistic financial planning and wealth management firm located in College Station, Texas. **Traditions Wealth Advisors utilizes well known asset custodians such as FIDELITY Institutional.** We are looking for long-term applicants to start in May and continue through the school year until the following May.

Many of our past interns have signed with Fortune 500 companies, the Big 4 Accounting firms or gone on to gain careers on Wall Street after completing their internship and degree at TAMU. Our internships provide you with the knowledge and experience you need to be competitive in the real world.

Duties:

- ▶ Analyze investment opportunities (e.g., funds, ETF's, MLP's, Managed Future Funds, REIT's, among other alternative investments) to assist in investment selection and portfolio management.
- ▶ Evaluate asset allocation strategies for clients through diligent research
- ▶ Research economic trends, market conditions and the global financial climate and report how those findings affect client portfolios
- ▶ Work collaboratively with the CFP's, CIO and other interns to conduct research that adds value to our clients' and to TWA as a firm.

Qualifications:

- ▶ Must be an undergraduate, junior, senior or master's student with investment experience
- ▶ Knowledge and/or experience in investing
- ▶ Finance 351 and 361 required for this internship
- ▶ Degree in economics or a business field, preferably finance or economics
- ▶ Required to have and maintain at least a 3.0 GPR
- ▶ Proficiency with Microsoft Excel, Word, and PowerPoint is necessary
- ▶ Possesses a genuine interest in investment evaluation, economic and financial trends and portfolio composition.
- ▶ Experience with forecasting and simulation modeling, fund research, or Morningstar Office applications is beneficial

More Information:

- ▶ Number of openings (per position): 3
- ▶ Workdays/Times: Monday-Friday/9am-5pm
- ▶ Hours per week: 10-15
- ▶ Starting Wage/Salary: \$10.00 per hour (+ semester bonus)
- ▶ Job location: Off campus (in College Station)

To apply, please email your resume, cover letter, and an unofficial transcript to:

Michael@TraditionsWealthAdvisors.com

or

visit our website www.TraditionsWealthAdvisors.com/Internship-Opportunities