



Traditions Wealth Advisors

Investment Analyst Internship

About Us

Independently Aggie-owned and operated, Traditions Wealth Advisors is a holistic financial planning and wealth management firm located in College Station, Texas. We utilize well-known asset custodians such as Fidelity Institutional. We are seeking long-term applicants to begin in May and continue through the school year until the following May. Many of our past interns have secured positions with Fortune 500 companies, Big 4 accounting firms, or launched careers on Wall Street after completing their internships and degrees at Texas A&M University. This internship will equip you with the knowledge and experience to excel in the professional world.

Intern Responsibilities

- 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 on how those findings affect client portfolios
- Work collaboratively with the CFP/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
- Working toward a 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
- Preferred relevant coursework: FINC 351 (Investment Analysis) / FINC 361 (Managerial Finance I)

Internship Details

- Number of Openings: 2 - 3
- Workdays / Times: Monday - Friday, 8:30 AM - 5:00 PM
- Hours per Week: 10-15
- Compensation: \$12 per hour + bonuses
- Location: Off-campus, College Station, TX

Visit our website for more information:

traditionswealthadvisors.com/internships

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

Matalyn@traditionswealthadvisors.com