

# **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.** We are looking for long-term applicants to start in May and continue through the school year until May of the following year.

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 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**
- Degree in economics or a business field, preferably finance or accounting
- 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): 2
- Workdays/Times: Monday-Friday/9am-5pm
- Hours per week: 10-15
- Starting Wage/Salary: \$7.25
- Job location: Off campus (in College Station)
- Class credit possible