



Finance Internship- Summer 2015

ETF Model Solutions, LLC/Endowment Wealth Management, Inc.

ETF Model Solutions, LLC and Endowment Wealth Management, Inc. is seeking to fill a Finance internship position for summer 2015. The 2015 Finance Intern will have the opportunity to gain experience with and learn about many important functional areas of the investment advisory business, including: investment research, asset allocation, ETFs, investment management, investment reporting and compliance, financial services marketing, and more. The position will provide you with a wide variety of projects and tasks that will challenge you to apply your classroom work in a real-world environment. This paid position is located in our corporate headquarters in Appleton WI.

We are thought leaders in the investment advisory business and this internship offers you the opportunity to join a credentialed, experienced team of investment professionals. As part of the internship role, you will have the opportunity to work with and support senior management and external service providers to:

- Gather economic and financial market data for use in research reports and marketing collateral
- Interact with investment committee members to research and gather investment data to review positioning, performance, portfolio structure
- Assist in creating compelling professional content and facilitate delivery of that content through various channels, including our websites, blogs, social media outlets, PowerPoint presentations, press releases/public relations, HTML email campaigns, and print collateral
- Work with financial advisors to assist with research, financial planning, wealth management client account development and servicing
- Compile, evaluate and update historical investment performance and risk management reporting
- Develop and maintain and/or utilize investment and/or marketing databases

This position will allow you to gain professional work experience involving financial markets, investments, asset allocation, exchange traded funds, marketing development, regulatory compliance, and investment research. You will work closely with and learn from experienced, credentialed professionals, benefit from a team experience, and cultivate a professional network that will be beneficial after graduation. The intern will report to the Managing Director of ETF Model Solutions.

Qualifications, Experience, Knowledge Requirements for Applicants:

- Currently pursuing a Bachelor's degree and have completed their junior year of course work with a targeted Major in Finance/Economics/Accounting, or similar major; a concentration in Finance/Investments are preferred with a minor in Marketing/Entrepreneurship a plus.
- 3.5 or better GPA
- Have completed basic level finance courses and demonstrate a basic understanding of general investing concepts and financial industry terminology
- Mathematics, economics, statistics, computer science skills
- Proficient in Microsoft Suite Office applications (PowerPoint, Word, Excel, Publisher)
- Availability to work Full time hours during the summer. Possible renewal of internship (part time) for fall and spring term
- Excellent interpersonal, written and verbal communication skills including proficiency in use of English language, writing, editing and proofreading
- Possess a strong attention to detail and ability to multitask and meet deadlines



The ideal candidate will also:

- Currently reside in the Fox Valley or surrounding area (Green Bay/Oshkosh) and be willing to consider continuation of their internship during the 2015-2016 school year
- Possess interest in investments evidenced by relevant course work, personal investing, or previous internship experience
- Demonstrate a strong work ethic, leadership and willingness to take initiative
- Possess aptitude for financial calculations and problem solving
- Have creative abilities that complement their analytical skills.
- Have an enthusiastic interest in pursuing a career path in the investment advisory/financial services industry
- Have experience with various social media platforms (Twitter, LinkedIn) or digital media apps (Word Press, Google analytics)

Salary/Benefits

This is an internship position for temporary full-time employment from May through August 2015. Possible part-time continuation through fall 2015- spring 2016 semesters.

Number of openings: 1
Pay rate: \$10 per hour
Position Type: Full time
Weekly Hours: 40
Benefits eligible: No
Location: Appleton, WI
Office Schedule: Monday-Friday 8 AM – 5 PM

ETF Model Solutions and Endowment Wealth Management is an equal opportunity employer. Candidates must be authorized to work in the United States and not require work authorization sponsorship by our company for this position now or in the future.

HOW TO APPLY:

Send resume and cover letter to: etfmodels.2015intern@gmail.com. No phone calls please.

Company Description

ETF Model Solutions and Endowment Wealth Management are affiliated financial services firms that share corporate headquarters in Appleton WI. Our firms work closely together to serve individuals, families, advisory firms, and institutional clients locally, regionally and nationally.

ETF Model Solutions, LLC provides the investment management services that develops diversified investment portfolios utilizing exchange traded funds to meet a variety of investor goals. The investment models that we build are utilized within 401(k) plans, by Investment Advisors within their practice, Family Offices, Endowments, Foundations, Trusts, and Individual Investors.

Endowment Wealth Management, Inc. is an independent Private Wealth Management Firm whose **sole mission** is to provide wealth sustainability for individuals, families, retirement plans, endowments, foundations and other institutions. We are valued family wealth advisors to clients throughout the United States because we serve our clients as fiduciaries, our experienced professional team, and our use of the Endowment Investment Philosophy®.

ETF Model Solutions and Endowment Wealth Management are co-creators of the Endowment Index™ calculated by Nasdaq OMX®.