



# VIRTUAL INVESTMENT ADVISORY INTERNSHIP

## COMPANY DESCRIPTION:

TrustNavigator is a national not-for-profit organization focused on career and life skills education preparing college students for careers. TrustNavigator's PATENTED content solution provides mentor led experiential internships onboarding into legacy internships and entry level programs. Employers benefit with unique screening metrics and prepared students ready for recruitment and a future career trajectory, 10-week programs occur three times a year in Fall, Spring and Summer. Participants can work from any location, introducing "working remotely" structure and responsibility. The program introduces language critical for onboarding, interviewing and preparation for traditional employer internships and entry level job opportunities. Mentors discuss career paths and skills to assist students identifying potential career options.

## WHY WORK WITH US?

Do you want experience that you cannot get anywhere else from industry mentors solely focused on teaching you their experience and even mistakes? Do you want legitimate projects that are actually relevant to your career goals? Do you want to learn how industry works? Our internships provide an introductory hands-on experience to understand the nuances of career paths from industry veterans. If you are a highly-motivated individual who is looking to gain knowledge, experience and skills to launch your future, then this is the perfect experience for you!

## INTERNSHIP DESCRIPTION/OVERVIEW:

- One hour "live" weekly conference calls led by seasoned professionals within industry.
- Lifeskill sessions in 3 of live calls of internship to discuss networking, social media responsibility, interviewing to employer needs.
- Proprietary tracking platform to archive data for employer and sponsor review.
- Weekly projects with industry application reflecting experience of internship for interviewing.
- Master's Boot Camps with industry specific mentors for referrals and endorsements.

## Skills/Qualifications:

- All students are eligible for this internship, interested in business experience, particularly valuable to students lacking prior experience.
- The ability to manage your time between school, extra-curricular activities, and this internship.
- An accountable work ethic to complete the ten-week program and commit 4-5 hours per week.
- Mandatory attendance on a weekly call and completion of a weekly project

## COMPENSATION:

This internship is an apprenticeship in Industry. The Mentors Internship includes supervision by experienced veterans of the industry with direct access to these individuals for mentorship and career advisory in the field. The apprenticeships are designed for those without industry experience to get a "first exposure" with quality oversight, fully compliant with all Department of Labor standards to learn the industry. Inexperienced applicants should clearly not expect to be compensated to learn the skills necessary to enter employment. Multiple individual sessions with advisors are part of the program to create a potential plan to employment.

**HOW TO APPLY:** Please send a resume to [info@trustnavigator.com](mailto:info@trustnavigator.com) with a cover letter. Apply at [www.lifelaunchcareer.com](http://www.lifelaunchcareer.com).



The virtual internship program is designed so students can work from their home or college campus. This makes the internship accessible to students who normally wouldn't be able to travel into the office due to study schedules, location, or other obligations. Superior Capital Management (SCM) offers clients diversified portfolio management strategies and provides them access to the most elite portfolio managers in the world. Each account is individually managed to meet the client's risk parameters and long term goals. TrustNavigator partners with SCM in this 10-week program, and the subject discussions are set forth below.

**Equity Securities and Style Box:** An introduction to the different classifications of Equity Securities

**Fixed Income:** In depth discussion of the Fixed Income markets

**Non-Correlating Assets:** Discussion on non-correlating investment approaches to the equity markets Introduction to alternative investment strategies

**Asset Allocation:** An introduction on asset allocation for diversification of a client's portfolio, benchmarks and index correlation

**Partner with a Portfolio Manager:** Here a Portfolio manager pitch a stock, create a report on the stock and then listen to six portfolio managers talk pros and cons of the stock ideas in a live forum.

**Social Media: Marketing:** Impact of content with focus on LinkedIn Training professional issues of social media.

**Networking:** Understanding how to build your network and introduce yourself to industry(s)

**Equity Research:** In depth discussion of the doing research and due diligence on a company

**Cost Cost Cost Discussion:** Insight on interviewing and networking techniques for entry level positions



# Weekly Projects:

Each week we will focus on a particular subject to understand how an investment advisor analyzes and chooses portfolio managers.

## Week 1: Equity Securities

FOCUS: Morningstar Style Boxes. Understand the basic classifications of equity securities. Apply Excel and Adobe applications,

ASSIGNMENT: Each intern will be assigned a manager in an asset class that was part of discussion.

## Week 2: Fixed Income

FOCUS: An introduction to Fixed Income Securities

ASSIGNMENT: Choose a portfolio manager that specializes in fixed income securities.

## Week 3: Non-Correlating Assets

FOCUS: A Discussion on non-correlating investment approaches to the equity markets Introduction to alternative investment strategies

ASSIGNMENT: Each intern will be assigned an alternative manager.

## Week 4: Asset Allocation

FOCUS: A discussion on asset allocation to diversify a client's portfolio

ASSIGNMENT: Assign allocation percentages of the different managers within each investment style previously identified in weekly assignments.

## Week 5: Social Media Marketing

FOCUS: Rules of engagement in social media do's and don'ts

ASSIGNMENT: Set LinkedIn page for self and organization, clean up social media history and establish organizational SM process

HANDOUTS: LinkedIn Best practice articles and cheat sheets of SM

## Week 6 : Equity Research

FOCUS: In depth discussion of the doing research and due diligence on a company Discussion with Portfolio manager on investment idea.

ASSIGNMENT: Write stock report from managers input and your research.  
Handouts: Previous report and Process Manual, Apply Excel and Adobe applications,

## Week 7: Networking

FOCUS: Maximizing resources to develop your network

ASSIGNMENT: Create a personal newsletter, brand and career path

HANDOUTS: Shadow interview questions, see week 9 Testing on My Next Move and 10<sup>th</sup> week programming

## Week 8: Analyst & Portfolio Management Discipline

FOCUS: Introduction and analysis of different managers within the same investment style.

ASSIGNMENT: Compare SCM managers with your funds chosen earlier in the semester.

## Week 9: Cost Cost Cost

FOCUS: Insight on interview techniques for entry level positions

ASSIGNMENT: Go out and video interview 2 people in your career space.

## Week 10: Idea Roundtable

FOCUS: Review and analysis of portfolio management discipline, diversification and investment style focus for portfolio. Review of asset allocation and entry strategy into the industry. Listen to six portfolio managers talk pros and cons of the stock ideas in a live forum