



Cleveland Investment Advisor Internship

COMPANY DESCRIPTION:

The Investment Advisor Internship explores how to provide investment clients diversified portfolio management strategies and access to the most elite portfolio managers in the world. Tom Roulston, the facilitator of this internship, has over 30 years of investment research and Financial Advising experience and has owned, or managed, multiple investment firms over his career. Passionate about bridging the student gap between the college experience and one's future career trajectory, Tom built a comprehensive internship that emphasizes investment strategies to allocate customer assets considering client specific needs and risk profiles and matching those with diversified managers in customized portfolios.

WHY WORK WITH US?

Do you want experience that you cannot get anywhere else? Do you want legitimate projects that are actually relevant to your career goals? Do you want to learn how the financial money management industry works?

We have designed our internship program to provide this! Our internships provide a hands-on experience of understanding the finance industry. You will work with our staff day in and day out, putting you right in the action.

If you are a highly-motivated individual who is looking to gain knowledge, experience and the capability to network, then this is the perfect internship for you!

INTERNSHIP DESCRIPTION/OVERVIEW:

This internship will be completed at our home office at 3615 Superior Avenue Suite 3101B Cleveland, Ohio 44114. You will get experience with:

- Investment Advising
 - Understanding how an investment advisor analyzes and chooses portfolio managers
- Research and Analytics
 - Industry Coverage, fundamentals
 - Dispersion analysis of client portfolio characteristics
 - Portfolio / Manager portfolio analysis
 - Examining and writing reports on individual stocks

SKILLS/QUALIFICATIONS:

1. GREAT Communication skills. High integrity.
2. An interest in investment advising, analysis, investing, research or marketing in the space.
3. The ability to manage your time between school, extra-curricular activities and this internship.
4. A great work-ethic. An interest in learning the "business" environment.
5. An open mind to understand what we are trying to teach.

COMPENSATION:

This internship is an apprenticeship in Investment Advisory. The Advisory Internships includes supervision by experienced veterans of the industry with direct access to these individuals both 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 and 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 Thomas Roulston at moondog@trustnavigator.com or contact him at (216) 780-9581 for more information. Learn more at www.Trustnavigator.com and www.Lifelaunchingcareers.com.