

MARKET STREET

WEALTH MANAGEMENT ADVISORS

INVESTMENTS AND OPERATIONS INTERNSHIP SUMMER 2019

When Market Street Wealth Management Advisors (Market Street) was founded in 2001, it was created with the guiding principle that its clients would be served in a manner in which its own team and their family members would want to be treated. At Market Street, we've built a team with the best and brightest people to ensure we're on the forefront of market trends while providing sound financial planning recommendations to help our clients achieve their goals. Today, we continue to focus on providing an unmatched client experience through comprehensive financial planning, integrated investment management, and qualified retirement plan consulting services.

FIRM INFORMATION

Market Street Wealth Management Advisors, LLC

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Indianapolis, IN 46280

www.mswma.com

Facebook: [@MarketStreetWealthManagement](https://www.facebook.com/MarketStreetWealthManagement)

Instagram: [@marketstreetwealthmanagement](https://www.instagram.com/marketstreetwealthmanagement)

Twitter: [@marketstreetwma](https://twitter.com/marketstreetwma)

JOB SUMMARY

This internship provides you with the opportunity to learn about the fee-only independent Registered Investment Advisor (RIA) business from the inside. You will experience many facets of our firm's investment management, operations, financial planning, and retirement plan consulting business as well as manage databases, implement investment strategies, research investments, client reporting, client operations, and contribute to special projects.

We anticipate that you will leave your internship with a strong sense for how a successful RIA firm operates and hopefully with a desire to join this growing profession after graduation.

POSITION DESCRIPTION

Title: Investment and Operations Intern

Dates: May 2019 through August 2019

Hours: 7:30 am – 4:00 pm Monday through Friday

DUTIES AND RESPONSIBILITIES

You can expect to gain exposure in the following areas:

- Learn firm procedures by spending the majority of your time doing the following:
 - Investments
 - Ensure that all holdings are accurate and reconciled with custodians.
 - Complete basic research and monitoring of existing assets and investment opportunities.
 - Manage account information when updates are needed or when new clients are onboarded.
 - Operations
 - Generate and distribute custom reports to aide advisors in decision making.
 - Assist with maintenance of client management system.
 - Aide in vendor management and assist in technology industry research.
- Assist with special projects.
- Complete research project on a to be determined facet of the internship experience.

QUALIFICATIONS

An ideal candidate would possess the following qualifications:

- Currently in a Bachelor's or Master's degree program specializing in Business, preference will be given to candidates graduating between December 2019 and June 2020. Strong consideration given to individuals with a CIS/Technology Minor or background.
- Expertise in Excel is required. The interview process will test level of skill mastered in Excel.
- Proficiency with Microsoft Windows, Word, and Outlook.
- Exemplary analytical skills, detail-oriented with a high degree of accuracy.
- Ability to multi-task, manage time effectively, and work unsupervised.
- Ability to maintain absolute confidentiality in dealing with client matters.
- Professional demeanor, team player, excellent people skills.
- Desire to work successfully in a small company environment.

COMPENSATION AND APPLICATION

This is a paid internship; compensation will be discussed during the interview process.

Internship Contact Information

Jessica L. Bokhart, CFP®

Partner

Phone: 317-860-1085

jessicab@mswma.com

www.mswma.com

Application Process

To apply for this internship position:

- Submit your cover letter, resume, and college transcript to jessicab@mswma.com
- If you are selected from our resume review, you will be contacted to begin the in-person interview process.

**Market Street Wealth Management Advisors, LLC is an Equal
Opportunity Employer**