



## **Finance/Investments Internship**

ETF Model Solutions® and Endowment Wealth Management® are offering a Finance and Investments internship opportunity for summer 2021 to assist with our growing Investment Advisory and Investment Management organizations. The paid position(s), located in our corporate headquarters in Appleton WI, will challenge you to apply your classroom work in a real-world environment supporting our credentialed, experienced investment advisory and management team. The internship(s) will involve tasks and activities covering a variety of business functions, including venture capital and private equity investments, financial and retirement planning, performance reporting, index construction, alternative investments, due diligence research, marketing (through traditional and digital channels), technology, and compliance.

This position will allow you to gain professional work experience in an area related to your degree, learn from other professionals, benefit from a team experience, and cultivate a professional network.

### **Requirements for Applicants:**

- Currently pursuing a bachelor's degree in business and have completed their junior year of course work with a targeted emphasis in Finance, Economics, Entrepreneurship, or related course of study
- 3.5 or better GPA
- Proficient in Microsoft Suite Office applications (PowerPoint, Word, Excel, Publisher)
- Excellent interpersonal, written and verbal communication skills including proficiency in use of English language, writing, editing, and proofreading
- Completed basic-level finance courses and/or demonstrate a basic understanding of general investing concepts and financial industry terminology
- Availability to work Full time hours during the summer of 2021.
- Self-motivated, enthusiastic, strong planning and organizational skills, well-developed writing and verbal communication skills, creative
- Possess a strong attention to detail and proven ability to multitask and meet deadlines

### **The ideal candidate will also:**

- Currently reside in the Fox Valley or surrounding area (Green Bay/Oshkosh)
- Have completed advanced business/finance courses
- Be working towards or considering a career in investment advisory or investment management industry
- Be seeking to become a CFP and/or CFA candidate



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## Salary/Benefits

This is an internship position for temporary full-time employment from May through August 2021. Possible part-time continuation through 2021-2022 school year.

Number of openings:	1-2
Pay rate:	Minimum \$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, LLC and Endowment Wealth Management, Inc. 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 [tim@etfmodelsolutions.com](mailto:tim@etfmodelsolutions.com). No phone calls please.

## Company Description

ETF Model Solutions, LLC and Endowment Wealth Management, Inc. are affiliated financial services firms that share corporate headquarters in Appleton WI. We are thought leaders in the investment advisory and investment management business working closely together serve families, advisory firms, and institutional clients locally, regionally, and nationally within the context of our Endowment Investment Philosophy. We are co-creators of the Endowment Index® calculated by Nasdaq OMX®.

ETF Model Solutions, LLC (“ETFMS”) develops ETF-based investment models within the framework of the Endowment Investment Philosophy. We seek to provide our investment solutions to 401(k) plans, other Investment Advisors, Family Offices, Endowments, Foundations, Trusts, and Individual Investors. MyRoboAdviser™ is a digital solution providing individual investors access to our Endowment Investment Philosophy.

Endowment Wealth Management, Inc. (“EWM”) 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.