

CLIFFORD SWAN

INVESTMENT COUNSELORS

Wealth Management Internship Summer 2024

June 10, 2024 – July 19, 2024 (to be confirmed based on mutually agreed start date)

Clifford Swan Investment Counselors is an independent, 100% employee-owned registered investment adviser serving affluent individuals, families, and nonprofit organizations. With \$3.8 billion in assets under management and approximately 950 clients, Clifford Swan is committed to providing objective investment management based on rigorous investment research and financial advice with personalized, responsive client service. Clifford Swan embraces a culture of mutual respect among colleagues, staff and leadership who remain rooted in the clarity of our founders' timeless values—client-first focus, highly personalized service, attention to detail, and complete commitment to our clients' financial success.

As an intern at Clifford Swan, you will participate in a program encompassing several of the key areas of our practice, including:

- Equity Research
- Fixed Income Research and Trading
- Mutual Fund Research
- Portfolio Management
- Investment Counseling

The internship will provide you the opportunity to develop skills in several areas of an investment advisory firm, while providing Clifford Swan with an opportunity to utilize your skills to better serve our clients.

Over the course of six weeks, you will work in our Pasadena, CA office and be a member of our team. A stipend of \$4,500 will be paid. You will be assigned projects that will require working both autonomously as well as with other members of our team.

Requirements:

- Pursuing an undergraduate degree in either economics or business and entering your junior or senior year, or having a demonstrated interest in a career in the financial services industry
- Advanced technological skills and the ability to learn specialized systems and software quickly
- Strong interpersonal skills and strong verbal and written communication skills
- Minimum 3.0 GPA
- Ability to manage and prioritize many tasks simultaneously
- Cover letter required

Please send a resume and cover letter by Friday, February 9 to Gretchen Lee at glee@cliffordswan.com.