



## Virtual Investment Advisor Internship

### **COMPANY DESCRIPTION:**

**Roulston Investment Partners** provides investment clients diversified portfolio management strategies and access to the most elite portfolio managers in the world. We are VERY customer service orientated in that we uniquely manage each individual account to meet the client's risk parameters and long term goals. The firm strengths include searching for leading portfolio managers and philosophies. The investment strategies 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 from a remote location such as your campus or home. 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:**

- Experience in the finance industry, Increase your "network", Individual career guidance, Resume and career consultation, Personal introductions to industry leaders

**HOW TO APPLY:** Please send a Resume to Thomas Roulston at [moondog@trustnavigator.com](mailto:moondog@trustnavigator.com) or contact him at (216) 780-9581 for more information.