

CRESTONE CAPITAL INTERNSHIP PROGRAM

Wealth Management

WHAT DOES OUR PROGRAM ENTAIL?

Crestone Capital seeks candidates for our internship program that will be responsible for assisting our Client Advisory, Investment Research, and Marketing and Business Development teams. Interns will take on day to day projects related to the delivery of Crestone's integrated wealth management services. New associate orientation, on-the-job training, periodic evaluations, and an exit interview at the end of the internship are included in our program.

Each intern will be allocated a mentor and will be supervised by respective members of the Client Advisory, Investment Research, and Marketing / Business Development teams. The ideal candidate will be detail-oriented, comfortable researching, produce and analyze Excel spreadsheets, reports, and contribute to other special projects relating primarily to alternative investments (hedge funds, private equity, real estate, commodities, and distressed debt), as well as traditional investments (stocks and bonds).

THE BASIC STRUCTURE

The expected time commitment for this intern program is a minimum of one summer for non-Colorado students and during the summer, interns are expected to work full time, around 40 hours a week. For students that attend local/surrounding universities, at least one summer plus a full school year is the minimum commitment. The position requires 16-20 hours per week during the school year, Monday through Friday between the times of 8:00am-5:00pm. Compensation is \$12/hour.

SPECIFIC DEPARTMENT ROLES

CLIENT ADVISORY

- Assist with client meeting preparation
- Research and report financial data using spreadsheets and internal reporting software
- General macroeconomic and market analysis with limited single stock analysis
- Assist with client performance analysis and asset allocation modeling
- Assist with items related to clients' estate planning needs

MARKETING & BUSINESS DEVELOPMENT

- Competitor, potential client, and white paper research
- Ongoing data entry for appropriate upkeep of client/potential client files
- Assist as needed with Client Relationship Management system updates with data mining from meeting notes and internet scan and archive paper files for existing records
- Scan and archive paper files for existing records
- Assist with events hosted by Crestone Capital Advisors

INVESTMENT RESEARCH

- Process quantitative and qualitative data regarding existing investment managers
- Generate reports regarding existing and prospective investment managers for Crestone's analysts
- Produce initial investment research on prospective investment fund opportunities and participate in follow-up due diligence
- Update daily summary of recent manager correspondence and performance data
- Attend internal meetings including bi-weekly Investment Research analyst meetings

COMPETENCIES REQUIRED

- **Distinguished academic performance;** it is strongly recommended that the student have a cumulative GPA of 3.2 or above or research
- **Computer/software skills** – MS Office Suite (Excel, Word, PowerPoint, etc.)
- **Initiative**
 - Plan ahead effectively
 - Act proactively more than reactively
 - Provide unsolicited input in a constructive manner
- **Communication**
 - Present information effectively in formal and informal written communication
 - Communicate openly and accurately
- **Teamwork**
 - Communicate decisions with team members
 - Collaborate effectively with every department
 - Show willingness to compromise
- **Innovation/Creativity**
 - Recognize and look for new techniques when faced with complex problems
 - Demonstrate excitement and passion about role, organization, and firm
 - Develop viable alternatives when encountering roadblocks while balancing realism and practicality with enthusiasm
- **Customer Focus**
 - Set realistic, achievable priorities and boundaries
 - Be punctual and generate timely output
 - Strong attention to detail

TO APPLY

Please send your resume, cover letter, unofficial transcript, and a schedule of availability to Susan Braun at sbraun@crestonecapital.com.