Summer 2015 Personal Finance Internships
Brandon Andreason

**Internship site:** Edward Jones in Madison, WI  
**Position:** Financial Advisor Intern

This summer Brandon had the opportunity to experience what it is like to work at Edward Jones. He performed many different tasks, which included setting up appointments, planning events, completing presentations and working with advisors to improve efficiency in the office and clients’ experience.

**Why did Brandon choose Edward Jones?**  
Through positive word-of-mouth, Brandon learned about the great features and respectable aspects of the company, and knew he wanted to continue his financial experience with Edward Jones.
Internship site: Edward Jones in Mukwonago, WI

Position: Financial Advisor Intern

Bret received the opportunity to work closely with financial advisors, but more importantly to add value into the business.

Why did Bret choose Edward Jones? Because the company focuses on personal relationships and employee satisfaction. The internship program also provides students with valuable experiences that will help them in their future careers.
**Internship site:** WipFli Hewins Investment Advisors in Madison, WI

**Position:** Associate Intern

As an associate intern, Zachary had various tasks. He assisted consultants, completed investment analyses and was involved in financial planning.

**Why did Zachary choose WipFli Hewins Investment Advisors?** The company believes in its fiduciary duties to its clients, which is an important aspect Zachary looks for in a company. In addition, the people Zachary met at career fairs and his interviews truly made him feel welcomed at WipFli.
Yiwei Huang

**Internship site:** WipFli Hewins Investment Advisors in Madison, WI  
**Position:** Associate Intern

Yiwei believes there were many highlights to the internship she completed. She was given the opportunity to see what it’d be like working full-time by drafting financial assessments, running insurance illustrations and assisting with business development programs, as well as preparation for client meetings. Overall, her internship helped improve her time management skills and learn how to write more professionally.

**Why did Yiwei choose WipFli?**  
After doing some research, Yiwei discovered that the firm’s investment philosophy and culture aligns with what she was looking for. It is also located in Madison, which is where she wanted to be for the summer.
Alex Johnson

**Internship site:** Waycrosse in Wayzata, MN  
**Position:** Assistant Investment Analyst

During his internship at Waycrosse, Alex became more proactive and learned the importance of it. He utilized his new and old skills to help the investment group complete their tasks, as well as other sectors.

**Why did Alex choose Waycrosse?**  
He saw himself working in a small office setting, and Waycrosse gave him that opportunity to test out that notion. Working in a small office setting is an important factor for him because it gives him the chance to connect personally and network with others.
James Magliocco

**Internship site:** Northwestern Mutual Lueder Financial Group in Milwaukee, WI  
**Position:** Financial Representative Intern

A major highlight to James’ internship is that he had the opportunity to perform most of the same tasks as the full-time representatives, except selling. These tasks include developing financial plans and making appointments.

**Why did James choose Northwestern Mutual?**  
What attracted James to the company is that its internships offer a great experience that is not just a summer full of busy work, rather a peek into what it is like to work at Northwestern Mutual full-time. Not only that, the company is well-respected and is full of experienced advisors that James was able to learn a lot from.
Elizabeth Meyrose

**Internship site:** UW Credit Union in Madison, WI
**Position:** Investment Services Intern

Elizabeth offered support to financial consultants in the Investment Services department to ensure that everything ran smoothly. She performed many tasks such as answering phone calls, scheduling appointments and updating paperwork. In the end, Elizabeth gained a better insight into the investment side of financial services, while also understanding the sales side of personal finance.

**Why did Elizabeth choose UW Credit Union?**
Elizabeth had previously worked at UW Credit Union as a teller and enjoyed her experience. Continuing her professional development at a company she was comfortable with seemed like the perfect fit.
Internship site: EcoLab in St. Paul, MN

Position: Commerce Solutions Intern

Dustin worked in the Pest Elimination division. He completed optimization analyses on the equipment the company uses, while also analyzing the market. By the end of the internship, he truly believed he gained the industry exposure he was yearning for.

Why did Dustin choose EcoLab?
EcoLab is a great company that has been viewed as reputable and offering valuable experiences. What really pulled him in was the intern project that was publicized to students at info sessions and interviews.
Kayla Plath

**Internship site:** BMO Harris Bank in Brown Deer, WI  
**Position:** Operations Intern

This past summer Kayla worked in the Operations department with accounts receivable and processed checks from customers’ vendors. Her main tasks involved prepping, extracting and keying. By the end of the summer, she was able to improve both her weaknesses and her strengths.

**Why did Kayla choose BMO Harris bank?**  
She chose BMO because it is a well-known company that treats its employees and customers respectfully. The company is also a big proponent of community giving, and that was an important factor for Kayla when choosing a company.
Theresa Rueth

**Internship site:** Cornerstone Advisors – Ameriprise in Wausau, WI

**Position:**
Financial Planning Assistant

Theresa assisted advisors in servicing clients, prepare for client meeting and deliverables, process new business, led follow-ups for advisors and draft financials.

**Why did Theresa choose Cornerstone Advisors - Ameriprise?**
Cornerstone Advisors offers financial planning and not just investment advice, which is what Theresa was looking for in a company. It also offers a great training program to help students transition from college to the work force, and it is a smaller office that offers a sense of family bonding.
Alex Schremp

Internship site: BMO Harris Bank in Madison, WI
Position: University Banking Intern

Over the summer Alex worked with the retail part of banking. He dealt with daily deposits, loans and mortgages. He also had the opportunity to learn what is most important to be successful in banking, i.e. building relationships and gaining customers’ trust is more important than financial advice.

Why did Alex choose BMO Harris Bank?
Alex has worked for BMO Harris Bank before, and he keeps continuing to have a positive experience with the company. Which has convinced him to keep returning to the company. He also likes how the company has many different areas and fields to network with, which also opens up a more broad array of opportunities.