



## EQUITY RESEARCH INTERN

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### FIRM OVERVIEW

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. We are a growing team of nine separated across two business segments: Wealth Management and Asset Management.

### INTERNSHIP PROGRAM SUMMARY

Our internship program should provide students the opportunity to discover their passion and apply the knowledge they have developed in the classroom to a professional setting. At the same time, it provides us the opportunity to identify talented individuals with attributes that best fit our firm's culture.

The Equity Research Internship is a 10-week in-person program offered in the fall, spring, and summer. Interns will be paid and are expected to work between 15-25 hours a week during the fall and spring and between 30-40 hours a week during the summer. The weekly schedule will be flexible and based around the student's class schedule in the fall and spring.

Candidates who are selected for this experience will have the opportunity to work directly with the firm's Chief Investment Officer and Asset Management team to complete equity research tasks using the Bloomberg terminal and Microsoft Excel.

The internship program will be based in our Connecticut office. The fall internship program will begin in September and last through November, the spring will begin in February and last through April and the summer will begin in June and last through August. To be eligible, you must be a college student during the time of the internship program.

### KEY ACCOUNTABILITIES

- Establish an understanding of Bloomberg API (specifically Bloomberg Query Language-BQL)
- Become familiar with Equity Research Analyst functionality on Bloomberg
- Develop at least two scalable excel models using the Bloomberg API for economic and market analysis
- Understand the different sections of the MFG Research Process
- Complete Quarterly Earnings Review for one sector and its industries
- Update and analyze MFG's scalable analytical templates

## QUALIFICATIONS

- For fall/spring/summer internship program must at least be an undergraduate junior
- Pursuing a BA/BS degree in Business related field, Economics, or Computer Science.  
May also qualify if pursuing MBA or MSBA.
- Minimum GPA of 3.0
- Proficient in Microsoft Excel, Microsoft PowerPoint, and Microsoft Word

## HOW TO APPLY

For further inquiry, please email [benjamin.monte@montefinancialgroup.com](mailto:benjamin.monte@montefinancialgroup.com) with an attachment of your resume.

For additional company information you may find us on [LinkedIn](#) or on our [Website](#).

*All qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, religion, sex, sexual orientation, national origin, age, disability, protected veteran status, genetic information, marital status, gender identity or any other impermissible criterion or circumstance. Monte Financial Group, LLC also takes affirmative action in support of its policy to hire and advance in employment individuals who are minorities, women, protected veterans, and individuals with disabilities.*