



monument
wealth management

Small Business Internship

**Have you considered working in the financial industry?
What about marketing and communications,
or business operations, or maybe you have a
passion for entrepreneurship?**

This internship will cover it all, and more.

To Begin...

Our goal is to provide you with a **valuable learning experience** and **spark (or advance) your interest in the financial industry**.

This opportunity is for current registered college students (including those taking a gap year due to COVID) who would like to gain experience working at an independent, boutique, entrepreneurial wealth management firm.

We not only support but actively strive to help create a more diverse and inclusive financial industry as a whole by encouraging underrepresented individuals to apply. Monument is an equal opportunity employer committed to equity, diversity and inclusiveness.

AN OPPORTUNITY FOR GROWTH

Monument has definitely shaped me in a positive way. It has made me more confident as a student...as a professional, and as a person.

- Kristen Zimney, 2017 Intern

This is a paid internship with a flexible schedule of approximately **8-16 hours per week**.

Due to COVID-19, the internship will be remote, and communications will take place over video, email and chat. If and when we transition back to the office, some hours may take place in our office in Alexandria, VA, just outside of Washington, D.C. next to the blue and yellow metro lines.

A VALUABLE LEARNING EXPERIENCE

Interning with Monument has allowed me to explore and widen my understanding of what I'm able to do.

- Ana Garcia, 2017 Intern

Internship Overview

As our Small Business Intern, you will get to see first-hand how our small business operates as you learn about and complete projects in all areas of our firm including:

- ❖ Business Operations
- ❖ Technology
- ❖ Marketing / Communications / Brand / Social Media
- ❖ Client Experience
- ❖ Private Wealth Design / Financial Planning / Personal Finance
- ❖ Portfolio Management / Investing

Your work will involve interaction with all members of the Team, including the Partners and CFA, CFP®, and CPWA® practitioners, and may include projects like:

- ❖ Monitoring and updating client accounts and databases
- ❖ Assisting in marketing campaigns
- ❖ Conducting research
- ❖ Participating in creative brainstorming sessions to improve our practices
- ❖ Observing client meetings
- ❖ Learning new software and proposing solutions to our team
- ❖ Completing trainings and/or certifications
- ❖ Participating in team meetings and reviews

You will have real opportunity to add value to our firm and have an impact on the operations of our business.

Who We Are

- **On paper, we're a wealth management firm.**

- In reality, we're equal parts creative lab, brain trust, and outspoken critics of the financial industry.

- **But, what we really are is...**

- A team of razor-sharp, innovative, collaborative, and creative thinkers with seasoned financial expertise, a renegade spirit, and zero commitment issues.

- **What we do is...**

- Provide opportunities for people to use what they have to get where they most want to go—and tap not just their potential for wealth, but their potential for living.

- For our clients, we do it in the form of thoughtful, considered, bespoke Private Wealth Design. For our team, we do it by providing opportunities for education, growth, and collaboration, so that they can become not just skilled advisors, but keener thinkers, creative problem solvers, and better humans.

- Monument Wealth Management was named a Washington Business Journal “Best Places to Work,” a “CAREing” company with exemplary community and family-friendly policies, and “Top Financial Professionals” by Northern Virginia Magazine. Read about these awards and more on our website.

A TRUE TEAM

It feels less like a group of coworkers and more like a family. Everyone at Monument has just been so welcoming and including...which completely blew me away because as an intern I didn't expect that kind of inclusion at all.

- Richard Grant, 2019 Intern

Who You Are

• Apply for this position if...

- You are a creative, driven, friendly, and easy-going student who is a self-starter, passionate about what you do and looking to contribute in a meaningful way.

• Don't apply for this position if...

- You want a very structured experience and don't want to put any extra effort, creativity or personality into your projects.

• We look for Teammates who without being asked will...

- Add energy to every conversation
- Highlight something funny
- Publicly applaud good work from others on the Team
- Offer to help others on the Team
- Organize things that look disorganized
- Clean something that's dirty
- Cut costs
- Invent a new service that clients want or a way to improve our Client Experience
- Treat clients better than they expect
- Get smarter at their job by being a self-starter (do training and read books)
- Share their knowledge
- Be curious and embrace ideas for change even if they ultimately don't work
- Have some tolerance for ambiguity
- Bring up difficult decisions to be made
- Always critique things that ended up not working and figure out why
- Find others to join our Team, both employees and clients

Ready to Apply?

Learn more about our company on our website, follow us on social media and watch our Internship Program playlist on our YouTube Channel.

Then send your resume and a thoughtful, creative cover letter to careers@monumentwm.com.