

Independent Investment Consultants

Programming and Management Internship Position Description  
February 2021

We are a boutique investment consulting firm focusing mainly on high net worth, private clients. As a small “open” firm, an intern would be involved mainly in VBA Programming, but also will have exposure to much of our internal work, discussions, process improvements and possibly special studies and analyses.

The intern would be exposed to the fiduciary responsibilities inherent in our business and have access to processes used to provide our services to clients.

This is NOT a semi full-time internship. Work schedule will be flexi-time, according to respective availability of both parties.

The intern will be given specific projects and will track progress using project management tools. The intern would be assigned projects including:

1. The firm has developed proprietary systems using Excel VBA. An intern with programming knowledge, will be involved in improving existing VBA routines and developing several new VBA Programs.
2. There is also need for a more sophisticated program, likely still VBA, to automate further our portfolio rebalancing workbook.
3. Analytical analyses of historical portfolio performance, markets, managers (mutual funds/ETFs), etc.
4. Potentially general research on topics of interest re markets, economic data, etc., either special studies or setting up sources for on-going updating of data of interest.

The ideal intern would have specific interest in learning about an investment related business.