



EQUITY RESEARCH INTERN

FIRM OVERVIEW

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. Our expanding team of eleven operates 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. Simultaneously, 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 compensated and are expected to work 15-25 hours per week during the fall and spring, and 30-40 hours per week during the summer. Weekly schedules will be flexible to accommodate the student's class commitments during the fall and spring semesters.

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 will be based at our Connecticut office. The fall program runs from September to November, the spring program from February to April, and the summer program from June to August. To be eligible, candidates must be enrolled as college students during the internship period.

KEY ACCOUNTABILITIES

- Establish an understanding of Bloomberg API, specifically Bloomberg Query Language-BQL.
- Learn to utilize Bloomberg's Equity Research Analyst tools and functionalities.
- Develop a minimum of two scalable Excel models using the Bloomberg API for economic and market analysis.
- Understand the various components of the MFG Research Process.
- Conduct a Quarterly Earnings Review for one sector and its associated industries.
- Update and analyze MFG's scalable analytical templates.

QUALIFICATIONS

- Applicants for the fall and spring internship program must be at least an undergraduate senior. Applicants for summer internship program must be at least an undergraduate junior.
- Pursuing a BA/BS degree in Business, Economics, Computer Science, or related fields; candidates pursuing an MBA or MSBA may also qualify.
- A minimum GPA of 3.3 is required.
- Proficiency in Microsoft Excel, PowerPoint, and Word.

HOW TO APPLY

For further inquiry, please email madelyn.monte@montefinancialgroup.com with an attachment of your resume as a PDF.

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.