

## Wealth and Investment Management (WIM) 2019 WIM Intern Program

At Wells Fargo, we want to satisfy our customers' financial needs and help them succeed financially. We're looking for talented people who will put our customers at the center of everything we do. Join our diverse and inclusive team where you'll feel valued and inspired to contribute your unique skills and experience.

Help us build a better Wells Fargo. It all begins with outstanding talent. It all begins with you.

Wells Fargo is a diverse, vibrant, constantly growing company. Wealth and Investment Management (WIM) is one of the company's four main divisions. With \$1.9 trillion in client assets, WIM businesses build enduring client relationships through sound, thoughtful and objective advice. We help our clients by developing individualized plans for everything from retirement goals to business succession planning, to family legacy intentions. Services include comprehensive planning and advice, investment management, brokerage, private banking, estate planning strategies, trust, insurance and both individual and institutional retirement. Wells Fargo perspectives are also available at [Wells Fargo Blogs](#) and [Wells Fargo Stories](#).

### *Program Overview*

WIM Early Talent seeks to attract, develop and retain exceptional recent\* college graduates to Wealth and Investment Management. Our goal is to build bench-strength as well as increase our commitment to diversity in WIM.

The Wells Fargo Wealth and Investment Management (WIM) Internship Program is ideal for current undergraduates interested in working in a collaborative environment which is focused on personal and professional development.

In the WIM Internship Program, participants will have the opportunity to understand the day-to-day responsibilities of a full-time team member, and will gain comprehensive professional and industry experience. Over the course of ten weeks, participants will also complete a group project, gain exposure to senior leaders, participate in a community service project and benefit from coaching and performance feedback sessions. WIM Interns will also participate in the Wells Fargo Corporate Internship virtual learning series.

The WIM Internship Program consists of two tracks: Cross WIM and WIM Financial Advisor (FA).

- **Cross WIM:** Intern positions throughout Wealth, Brokerage, Retirement, Abbot Downing, WFII, WFAM, and Staff lines of businesses. Program participants gain a deeper knowledge of the financial services industry through hands-on experience in the fields of investment management, financial analytics, project management, consulting, and beyond.
- **WIM FA:** Varying number of open positions determined by business needs: Interns located in Private Client Group (PCG) and Wealth and Brokerage Services (WBS) branches mentoring under a Financial Advisor

The position we are recruiting for is within our "Online Accessibility Program" under Manager: November Champion. The position is located in St. Louis, MO for a full-time Internship opportunity, expectations are 40 hour work weeks from June 3<sup>rd</sup> – August 9<sup>th</sup>, 2019.

### *Business Overview*

**Wealth Management:** Wealth Management business is a leading provider of financial services to high-net worth clients through Wells Fargo Private Bank, and to the affluent segment through partnerships between Wealth Brokerage Services and the Community Bank. In Wealth Management, clients are provided with a complete range of solutions to help them manage, preserve and transfer their wealth.



**Abbot Downing:** Abbot Downing is a boutique business within Wells Fargo that serves individuals and families with investable assets of at least \$50 million or net worth of \$100 million, as well as their endowments and foundations. Abbot Downing strives to build long-standing relationships by helping clients preserve and grow wealth, address the impact of wealth across generations and leave a legacy of purpose.

**Wells Fargo Advisors:** Wells Fargo Advisors operates the nation's third-largest Brokerage business with 14,400 Financial Advisors and 4,500 licensed bankers in retail stores across the U.S. Wells Fargo Advisors administer \$1.6 trillion in client assets. Unprecedented choice and flexibility for Financial Advisors and their clients is provided through distinct business channels supported by established products, services and technology.

**Retirement:** Wells Fargo Retirement is a top retirement provider to retail and institutional customers across the U.S. Wells Fargo ranks second in annuity distribution, sixth in IRA assets and eighth in retirement plan recordkeeping. The company also administers custody assets, provides investments and executive benefits to institutional clients and delivers reinsurance services to global insurance companies.

**Wells Fargo Investment Institute (WFII):** Wells Fargo Investment Institute is an organization that provides global manager research and investment strategy advice to Wells Fargo's Wealth and Investment Management division.

**Wells Fargo Asset Management (WFAM):** Wells Fargo Asset Management brings together a strategic balance of investment capabilities to serve the investment needs of clients worldwide: institutions, financial advisors, and individuals. Wells Capital Management is a registered investment advisor and a dedicated institutional asset manager within the WFAM umbrella. Their mission is to deliver superior investment service to our institutional clients globally.

### *General Responsibilities*

- Interact with leaders at all levels of the organization including senior management, team members, individual contributors and vendors.
- Provide customer service to clients and internal team members as needed and appropriate.
- Understand processes and work flows to make recommendations for process improvements.
- Bring closure to issues, questions and requests. Solve problems independently.
- Understand business needs and provide possible solutions by explaining in clear verbal and/or written communications to customers and/or management.
- Consistently learn new systems, applications, processes and techniques.
- Lead or participate in projects or support activities, which are moderate in size and organization span.

### *Required Qualifications*

- 1+ month of professional experience through internships, part-time, or full-time work

### *Desired Qualifications*

- Completion of coursework in Business, Economics, Finance, Accounting, Marketing, Communications, English or related field
- Experience successfully collaborating with others in a change driven environment
- Excellent verbal, written, and interpersonal communication skills



- Leadership experience including: coaching, training, and mentoring
- Ability to organize and manage multiple priorities
- Ability to prioritize work, meet deadlines, achieve goals, and work under pressure in a dynamic and complex environment
- Intermediate Microsoft Office (Word, Excel, Outlook, and PowerPoint) skills
- Knowledge and understanding of financial services industry

### *Other Desired Qualifications*

- Prefer an undergraduate degree with a graduation date of December 2019 – May 2021\*

### *Job Expectations*

- Ability to travel 5% or more of the time

### ***How to Express Interest:***

Submit your resume for consideration to [Katie.Brabon@wellsfargo.com](mailto:Katie.Brabon@wellsfargo.com) directly by December 17<sup>th</sup>, 2018. Please indicate the following subject title in the email: "Online Accessibility Program Interest". Please see attached Position Description.

**Wells Fargo will not sponsor visas for these positions, and will not hire individuals whose work eligibility is based on their F-1 or other student visa status. Candidates must be authorized to work in the United States on a permanent basis.**

