

Investments Intern New York, NY

Company Summary

Veris Wealth Partners is an independent, SEC registered, impact wealth management firm founded in 2007 by five partners who share a deep conviction in the interdependence of values and wealth. Veris clients include individuals, foundations, non-profit organizations, family offices, and investment advisory firms. At Veris, this philosophy of aligning wealth with values to create meaningful impact is central to the company's identity and culture and mission to utilize financial markets to direct capital to sustainable and regenerative endeavors.

Veris' vision is to create an equitable, just and sustainable world. Justice, equity, diversity and inclusion touch every aspect of our work: how we hire and create a culture of belonging, how we select vendors, and how we invest. Veris believes investors can have positive social and environmental impact across all asset classes and strategies through ESG integrated investing, shareholder advocacy and thematic investing. Veris invests through four impact themes – a) climate solutions and the environment, b) sustainable and regenerative agriculture, c) racial and gender equity and d) community wealth building.

Veris is recognized as both a pioneer and leader in the field of sustainable, responsible and impact investing, and is strongly equipped to provide solutions for clients seeking to create change through their wealth while meeting financial objectives.

Veris is a proud B Corp and [Best for the World](#)® Overall Honoree (2019, 2018, 2017, 2016, 2015, 2014, 2013).

Veris has offices in New York City, San Francisco, Portsmouth, NH, and Boulder, CO. For more information, please visit our website: www.veriswp.com.

Position Summary

This position offers candidates the opportunity to learn about the rapidly changing area of Sustainable, Responsible and Impact Investing across all asset classes.

Work closely with the Investments Team on all aspects of investment research which may include any of the following:

- Build knowledge and expertise of the impact investment ecosystem
- Analyze and evaluate impact metrics reported by managers and funds to capture both the positive and negative impact resulting from approved investments
- Assist in streamlining impact data collection and analysis using data analysis tools (such as Excel, Python, Tableau, etc.)

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We celebrate diversity and are committed to creating an inclusive environment for all employees*

- Assist in preparing firmwide and client level impact reports and any additional disclosures throughout the investment process
- Research, identify and present advancements and developments in impact measurement and management practices across all asset classes on an ongoing basis
- Support the Research team in effectively sourcing and managing pipeline of investment opportunities that align with Veris' impact themes
- Assist with the evaluation of financial performance of fund managers through ongoing monitoring and reporting of quarterly fund performance with associated benchmarking
- Participate in and record minutes for the Veris Investment Working Group and the Investment Committee meetings
- Present on one of the research projects to the Investment Working Group
- Assist in various ad hoc projects including in cross-functional teams to drive efficiency within the firm

Work Location: Hybrid - Students will work primarily remote but will be required to work in the NY office once a week, if local.

Expected internship date: June 2024 – September/October 2024 (Expectation is 30+hrs during the summer months of June through August and 15-20/hrs once school starts in September).

Education/Experience/ Skills

- Commitment to impact investing and/or the advancement of environmental and social sustainable practices
- Certification, Graduate or MBA program enrollment in finance, wealth management, sustainability or related field preferred but not required
- Experience with data analytics and modeling preferred
- Understanding of financial markets preferred but not required
- Demonstrated aptitude for qualitative and quantitative analysis and ability to conduct comprehensive research related to sustainable and impact investing
- Intermediate to Advanced skills in Microsoft Office, Word, Excel and PowerPoint. Knowledge of programming language like Python
- Ability to work in a dynamic environment and manage multiple tasks and responsibilities
- Strong oral and written communication skills
- Intellectual curiosity and a demonstrated ability to work collaboratively

Compensation

\$25.00 per hour



Values. Wealth. Sustainability.

New York
San Francisco
Portsmouth

www.veriswp.com

Application Instructions

To apply, please submit your resume and a cover letter outlining your specific interest in this opportunity through the following link <https://newlevelresources.applytojob.com/apply/WcRhYXTjNE/Research-Intern-Impact-Investment>. Resumes will be reviewed as received.

EEO Statement

Veris Wealth Partners provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability, or genetics. In addition to federal law requirements, Veris Wealth Partners complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities.

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