



**About Westfuller:** Westfuller is an independent, and objective investment advisory and wealth management firm founded by Lola C. West and Ian Fuller.

Learn more about our founding story [here](#).

**Our Mission:** Igniting Progress and Possibility through Finance | Every day we witness the impact financial resources have on opening doors to possibility and paving the way to welcome change. As an investment advisor, we provide foundations, endowments, family offices and individuals with purposeful financial planning and multifaceted investment strategies to help them reach their financial and mission-based goals, which include racial, gender, economic and climate justice targets. Read more about what we do for [institutions, families, and individuals](#).

**Summer 2024 Internship Program:** Westfuller is deeply committed to building the field of impact investing by cultivating a diverse and inclusive next generation of professionals. Hence, Westfuller is hosting an internship program for undergraduates interested in learning more about wealth management and investment advisory. We focus on recruiting diverse candidates from underrepresented backgrounds to join the firm. Beyond previous experience, we are looking for motivated and passionate students who are willing to take the initiative in their learning.

**Title:** Westfuller Summer Intern | 2024

**Internship Roles & Responsibilities:** Interns have hands-on experience supporting colleagues on internal and client deliverables related to client servicing, investments, and operations.

*Operations:*

- Coordinate and support implementation and maintenance of new and existing systems and processes
- Support the development and enhancement of administrative procedures through systems research & implementation
- Collaborate across departments to help plan firm-wide initiatives
- Represent Westfuller in relationships with external partners, including vendors, consultants, and clients
- Conduct and support colleagues on a variety of general administrative tasks and troubleshooting questions and challenges

*Client Services:*

- Participate in considering and developing ideas and strategies for business development
- Research and develop insight into leveraging the client experience
- Assist in engagement with client communications

*Investments:*

- Conduct market research on impact investing trends affecting our private wealth and institutional clients
- Collect and synthesize investment strategy fact sheets and commentary
- Participate in investment research calls and conduct quantitative and qualitative due diligence on sustainable and impact investment managers.

Westfuller is an Equal Opportunity Employer and does not discriminate based on race, ethnicity, gender, religion, sexual orientation, age, physical ability, or involvement in the criminal justice system. We invite individuals with diverse life experiences and non-conventional backgrounds to apply.

**Program Details:**

- 8-12 week program from June 2024 - August 2024
- 40 hours p/week
- Preference for In-Person or Hybrid with 3 days in the office

**Qualifications:**

- Pursuing a bachelor's degree with a strong GPA
- Ability to work at a high level of discretion with sensitive confidential information
- Demonstrates a genuine interest in continuously learning and expanding their knowledge base. Asks insightful questions and actively seeks out new information and challenges.
- Strong organizational and planning skills are crucial to ensure the smooth execution of projects and timely delivery of results
- Demonstrates initiative and ownership.
- Possesses a strong desire to make a positive impact and drive results.
- Thrives in environments where accuracy and precision are essential.
- Collaborates effectively within a team environment, fostering open communication and mutual respect. Values the contributions of others and readily offers support and assistance.

**Hourly Rate:** \$25.39 USD