Financial Planning Program

The Power of Two

Selected Student Comments about Summer Internships

“My internship gave me a better insight into the financial planning industry from a small business perspective. I was able to apply what I learned in the classroom to the real world, in addition to getting the hands-on experience that you cannot get in the classroom. I also saw how rewarding it can be to have close relationships with clients who really appreciate the value you bring to them as an advisor in helping them to achieve their financial goals.”

“I recommend an internship because it gives you the chance to do the real world job you’re training for without actually being in the real world.”

“My internship was important because it provided real world experience that is not offered in a classroom. I learned how to speak with clients, and how to act in a professional setting.”

“Having my internship with [company] was very important to me because it enabled me to get my foot in the door and experience financial planning from a business side. I would recommend an internship because it gives you the experience you need when looking for a job. If you don't get an internship, I truly think you will be very far behind the rest of the pack that did. I learned a lot from my internship: how to use different financial planning software, how to educate clients, and mainly the roles of a paraplanner.”

“My internship was important to me because I needed real-world experience that prepares you for the professional world, not just what I learned in classrooms. I learned that financial planning is a industry of compassion - you have to care about your clients if you want to have a fulfilling career. I learned how to interact with different types of people and realized that every client has a unique situation, so a financial planner never gets bored.”

“During my internship, I was able to see the day to day actions, work environment, and lifestyle of Certified Financial Planners firsthand. This experience has allowed me to make decisions about what to do after graduation with much more confidence than I had before.”

"I enjoyed experiencing the good and bad aspects of the industry. An internship can either scare you away or draw you towards financial planning. It will help determine whether or not you truly want to make this your life's work."

“My internship at [company] provided a hands-on learning experience in the insurance and financial services industry. Through building relationships with clients, I got a better understanding of the skills needed to be a successful financial planner. I got an understanding for what it takes to build a client base and how to start addressing their needs.”
“My internship gave me insight to the day-to-day business of a financial planner and the real world of a small asset management firm. Any student looking to work in the financial planning industry should spend time in an office through an internship to make sure it is for him or her. There is a multitude of minutia about the industry that students do not learn in the classroom.”

“It was great to finally see the real world applications of everything we have learned over the past three years. Getting to work with real clients was a great experience.”

“Through my internship I was able to gain valuable hands-on experience in the field of financial planning. I believe that the most beneficial aspect of my internship was sitting in on client meetings with the planner.”