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Internship Evaluation Executive Report

This summer, I had a two-month internship at Morgan Stanley Smith Barney in Boca Raton, Florida. The internship was my first real-world experience of both the financial industry and wealth management. The Boca Raton office of Morgan Stanley Smith Barney is one of the company's largest with over eighty financial advisors. I was able to work with both teams of advisors as well as individual advisors that really allowed me to see how different advisors approach wealth management.

My responsibilities as intern included researching data for advisors, compiling and sending out paperwork to clients, taking notes during conference calls, and answering the phones. Every week, I had to compose a group of candlestick charts regarding the day-to-day movements of certain indexes as well as gather a list of the top performing Exchange-Traded Funds for the financial advisor I worked with the most.

During my time at Morgan Stanley Smith Barney, the markets fluctuated due to both the Greek crisis as well as the US debt ceiling countdown. It was very interesting to see how the financial advisors had to change their investment strategies in order to keep their clients' money safe. During these times, the office became extremely busy with clients phoning in asking their advisors about the markets. It was amazing to see the shift in attitudes during these hard times.

Throughout the internship, I was able to have informational interviews with various financial advisors. It was very interesting to listen to their advice and see how they became involved in the business.

My summer internship was a great first look into the world of wealth management. I would love to one day go into this field, however, I will need gain more experience before I do!