

The Interns



It's hard to believe that it is late August already, as we look forward to the Labor Day weekend and sadly say goodbye to our fantastic group of hardworking summer interns. We hope they learned a lot, and we thank them for the contribution they made to Klingenstein Fields Wealth Advisors (KFWA).

This year's group hailed from a wide range of leading U.S. schools, including University of South Carolina, High Point University, Fordham University, Williams College, and Bentley College. One intern was even a second summer returnee, so we must be doing something right!

We have thoroughly enjoyed meeting each intern and introducing them to the world of financial services. As one last "project," we conducted our annual informal survey of the interns by asking them a few questions before they left. The answers were funny, unexpected, and helpful, as we continually try to improve in every way that we can. We hope you enjoy some of the answers we received:

What is your favorite part about interning at KFWA?

"Everyone's door is always open, and you're always welcome to ask anyone any question."

"It motivates me every day when I know the research I am doing will affect our investment strategy for our clients."

"KFWA is a firm that actually teaches interns about finance, where in many other firms, the intern schedule is only filled with busywork."

What's the most fun or interesting thing you did at KFWA?

"Once I mixed coffee and tea together when I came to the office at 6 a.m.!"

"Doing a valuation and a pitch for a company was truly unique and challenging and a great learning experience."

"Presenting in front of the Investment Committee. Having the chance to present in front of such a significant group was very exciting to me, and I value the experience."

What was the hardest part of your internship?

"The hardest, but also the most rewarding, part is when you hit a wall doing research. Learning how to work through problems you encounter, or a formula you are unfamiliar with, makes success much more rewarding."

"Non-stop reading of reports – we didn't have to read that much in school!"

"Learning to be self-motivated and trying to find my own solutions or opinions before giving up and seeking help was challenging yet also taught me a valuable lesson."

What courses at school or previous experience most prepared you for a KFWA internship?

"Finance, Economics, Equity Valuation, accounting... the list goes on."

"Math-related classes really helped with the numerical side of valuing a company and understanding different techniques."

"As a KFWA returner, KFWA is perhaps the only thing that has properly prepared me for KFWA."

What have you learned that will be most useful for your future professional life?

"KFWA offers a crash course in finance that outdoes any other, and this broad base of knowledge is the most useful takeaway from the internship."

"Learning is a long-lasting journey. Staying current is the most important thing."

"At KFWA, you gain exposure to the many facets of a business and see how each area works together to provide the best solutions for clients."

What words of advice would you give someone interested in an internship at KFWA?

"Use the resources you are surrounded by and truly embrace the knowledge around you."

"Get involved in the opportunities given to you at school, keep an open mind to learning new things, and don't hesitate to ask others for help and advice."

"Everyone, no matter how senior, is very friendly and willing to help with any questions or concerns. The firm is full of successful business leaders who were in our shoes once."

At Klingenstein Fields Wealth Advisors (KFWA), we are committed to helping the next generation learn and build their knowledge base. We welcome the opportunity to engage with our next generation client regarding any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services. A copy of our current written disclosure statement discussing our advisory services and fees is available upon request or by clicking [here](#). Please read the expanded disclosures by visiting our website at www.klingenstein.com.

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