



# SIMON QUICK

## ADVISORS

**Job Title:** Internship Program  
**Location:** Morristown, New Jersey

### **About Simon Quick Advisors**

Simon Quick Advisors is a wealth management and investment consulting firm that advises high net worth individuals and families. Simon Quick Advisors is an independent registered investment advisor (RIA) offering customized integrated financial planning and investment solutions. The firm has offices in Morristown, NJ, New York, NY, Chattanooga, TN and Denver, CO.

### **Why Work at Simon Quick Advisors?**

Simon Quick Advisors' culture and company philosophy are founded on a set of fundamental values that influence the choices we make and the actions we take. Our core values encompass integrity & honesty, mutual trust & respect, ownership & accountability, and humility. We provide opportunity, nurture talent, develop our people and reward achievement. You will be joining a culture that promotes functional excellence and teamwork, a passion for learning, and values employee input to help shape the future of the firm.

### **Program Description**

Interns have exposure to all aspects of the business, with a focus on client service and investment research. Interns provide support where it is most needed and are trained as generalists rather than hired for a specific role. Simon Quick Advisors primarily seeks interns who have an interest in business, particularly finance, and wish to have a career focused in investing and/or financial planning.

### **Duties & Responsibilities**

- Daily administrative support including scanning documents, filing statements, answering phones or other general office-related tasks.
- Work with our client service team to prepare portfolio analytics and presentation materials for client and prospect meetings.

- Attend client calls that cover topics including market outlook, portfolio performance, and financial planning
- Create manager profiles in proprietary database and liaise with investor relations departments if necessary.
- Take detailed notes on manager calls and attend investment research team meetings.
- Generate research surrounding macro events affecting the investment community.

### **Attributes**

- Foster a positive atmosphere within the office and with clients.
- Display team-oriented, collaborative spirit.
- Present professional behavior, appearance, and etiquette at all times.
- Ability to work under multiple managers in a dynamic environment.
- Ability to work at a high level of independence.

### **Qualifications**

- Proficient with Microsoft Office, particularly Excel, Outlook, PowerPoint, and Word.
- Highly self-motivated individual who can work independently as well as on a team.
- Strong organizational, time management, and written/oral communication skills.
- Strong attention to detail.
- Knowledge of investing and financial markets is helpful but not required.

### **Application Process**

To apply, please submit a cover letter and resume to [jobs@simonquickadvisors.com](mailto:jobs@simonquickadvisors.com) and complete the online application at <https://simonquickadvisors.com/careers>

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