

Seidman College of Business
Finance Internship Learning Objectives

Student Name:_____ **Major:**_____

Internship Title:_____

Company/Employer:_____

By doing the tasks checked below, my participation in this internship will allow me to explore different work environments and organizational cultures, learn to interact with diverse personalities, and assist me in determining if I am well-suited to career opportunities in this field:

☒ Analyze how this internship fits into my career goals.

General:

- ☐ Gain insight into the working environment and understanding the culture of the firm.
 - ☐ Develop a skill set of gathering questions and asking appropriate personnel for assistance.
 - ☐ Develop skills required to interact with senior management and staff (for example: Controller, CFO, managers, senior associates, staff, and office staff) in a professional manner.
 - ☐ Develop time management skills and the ability to be responsible for more than one project at a time.
 - ☐ Develop organizational skills to complete the project in a timely manner.
 - ☐ Other – list below.
-

Corporate Finance:

- ☐ Gain working knowledge about the credit policies of the company and the administration of the credit management process.
 - ☐ Gain working knowledge about the receivables policies of the company and the collections procedures.
 - ☐ Gain working knowledge about the inventory policies of the company and the inventory management process.
 - ☐ Gain a good understanding about the cash management policies of the company.
 - ☐ Gain a good understanding about the treasury activities of the company.
 - ☐ Gain insight into corporate budgeting process used by the company.
 - ☐ Learn internal and external financial reporting procedure used by the company.
 - ☐ Other – list below.
-

Investments:

- ☐ Gain an understanding of the process used by the firm to examine the investment goals of the client.
 - ☐ Gain insight into security analysis methods used by the firm.
 - ☐ Learn to use the proprietary software used by the firm to analyze the investment needs of the client.
 - ☐ Gain an understanding of the investment databases used by the investment firm.
 - ☐ Gain knowledge about the various investment products offered by the firm.
 - ☐ Develop skills needed in communicating with customers regarding their investment accounts.
 - ☐ Understand the various rules and regulations pertaining to the sales of the investment products.
 - ☐ Other – list below.
-

Banking/ Financial Services:

- ☐ Gain an understanding of the procedures used by the firm to evaluate its loan applicants.
 - ☐ Learn the process of documenting work performed on loan applications and communicating effectively with supervisors and other company personnel.
 - ☐ Learn the regulations related to lending policies of the firm.
 - ☐ Learn to work in the various divisions of the bank/institution.
 - ☐ Learn to work with bank customers and explain the account options available at the bank.
 - ☐ Other – list below.
-

Financial Planning:

- ☐ Gain insight into customer service focus of the firm.
 - ☐ Learn to use the proprietary software used by the firm to analyze the investment needs of the client.
 - ☐ Gain an understanding of the investment databases used by the investment firm.
 - ☐ Gain a further understanding of the process used by the firm to examine the investment goals of the client.
 - ☐ Develop skills needed in communicating with customers regarding their investment accounts.
 - ☐ Learn more about the insurance planning and other aspects of financial planning.
 - ☐ Learn to meet with prospective clients and how to build a client base.
 - ☐ Other – list below.
-

_____ **Faculty Signature** _____ **Date**

_____ **Faculty Name (Print)**