

## **Intern, Investment Team**

**Employee Status:** Full-Time Summer 2020

**Travel:** No

**Primary Location:** Edina, Minnesota

***Punch & Associates is a Minneapolis-based, independent investment and wealth management firm serving a select number of families, family offices of substantial wealth and institutions.***

### **Firm Overview**

Founded in 2002, Punch & Associates is a nationally recognized, employee owned, independent investment and wealth management boutique with a history of delivering strong investment performance, highly customized wealth planning and intimate client service. The firm takes a bottoms-up investment approach to create portfolios that meets our clients' needs. Our risk-averse investment philosophy is centered on preserving and growing our clients' assets. Our team of seasoned professional advisors work closely with our clients to enable them to pursue their varied and rewarding life interests, both personal and professional.

### **Our core values are:**

1. Aiming past the target;
2. Having diligence and persistence in our work;
3. Displaying humility in our interactions;
4. Building the company for permanence; and
5. Maintaining a fun place to work.

### **Job Description**

- Conduct in-depth fundamental research on small and micro-cap companies
- Present research analysis in written and verbal form
- Track recent developments and news on portfolio companies and watch list companies
- Participate in the wealth planning process and attend client meetings
- Learn about all job functions within an investment and wealth management firm

### **Education/Experience/Qualifications**

- Current enrollment in a Bachelor's degree program required, graduation date of December or Spring 2021
- Desire to learn and develop fundamental research equity analyst skill set
- High level of curiosity about business, investment management and the equity markets
- Strong academic record
- Ability to work with a team and independently
- Excellent analytical skills, communication and presentation skills
- Advanced computer skills using Microsoft Word, Excel, PowerPoint and Outlook. Bloomberg experience a plus.

If you are interested in applying for this position, please email your résumé and cover letter to [pdwyer@punchinvest.com](mailto:pdwyer@punchinvest.com)

Punch and Associates is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, disability status, protected veteran status, sexual orientation, gender identity or any other characteristic protected by law.