

# CAMBRIDGE THE NEXT STEP



At Cambridge, we think life should be enjoyed and that the success of our relationship should be measured not only by our mutual prosperity, but also by how enjoyable it is for us to work together. Our values are truly important to us and are a major reason why we have been able to maintain our small-firm, family centric culture even as we have grown and gained national prominence. We are proud that independent financial professionals who share our values of integrity, commitment, flexibility, and kindness choose Cambridge.

Cambridge is one of the nation's leading independent broker-dealers dedicated to offering unbiased investment advice for financial advisors to use with their clients.

## THE NEXT STEP™ INTERNSHIP PROGRAM

The Next Step™ summer internship program is a unique opportunity for college students to gain first-hand knowledge and experience working in the financial industry. Cambridge offers a broad spectrum of opportunities beyond the financial world that will provide practical experience to enhance your college studies.

This internship is a full-time, 10-week paid program that typically runs from June - August.

## Our INTERNSHIPS

### ACCOUNTING (COMMISSIONS AND MANAGED ACCOUNTS) INTERN

The Accounting Department offers a great opportunity within the Commissions and Managed Accounts Team, offering an intern experience with the everyday functions of an accounting department in the back office of a broker-dealer. The Accounting Intern will be involved in various areas throughout the department including some non-conventional accounting and auditing tasks. Ideal candidates will have completed intermediate level accounting courses or above, be a self-starter, have the ability to multi-task, and work well within a team environment.

*Ideal focus: Accounting, Finance, Business Management, or similar majors*

### ADVISOR SERVICES - TECH SERVICES INTERN

The Advisor Services Team is offering a student a great internship experience through the Tech Services Intern position. The intern will actively participate in projects related to analysis of activities within CLIC (Cambridge Logistics and Information Center). In addition, interns will assist with preparation and follow up activities for Roadshow events, including review and analysis of attendee usage statistics. Desirable skills include an aptitude for learning new computer systems, SQL knowledge, strong organizational skills, good communication skills, and attention to detail.

*Ideal focus: Technology Support/Development, Public Relations, Marketing, or Data Analysis*

## **ADVOCACY AND SUPERVISION INTERN**

Join the Advocacy and Supervision Team to gain experience in a variety of areas within a broker-dealer setting, including data entry, report generation, out-bound calling campaigns, and field office visits. This internship will offer exposure to other teams, including Business Development, to increase the big picture view of the financial services industry for the intern. Great communication skills and an ability to travel on minimum two-day trips are essential.

*Ideal focus: Communications, Public Relations, Business, Management, or Finance*

## **BUSINESS DEVELOPMENT INTERN**

The Business Development Team offers a stimulating internship experience for a student who loves problem solving, communicating with people, and developing new strategies. The Business Development Intern will learn how to send and analyze targeted messages, allowing the intern to get a look into the nature of a recruiting profession. In addition, the intern will help implement marketing campaigns developed by Cambridge.

*Ideal focus: Marketing, Communications, Finance, or similar majors*

## **BUSINESS STRATEGY INTERN**

The Business Strategy Intern will gain a unique perspective of the financial services industry, and the broker-dealer world as a whole. Working closely with Cambridge's Continuity Partners Group, the intern will gain exposure to selling activities, business consulting, intranet implementation, and survey segmentation. In addition, the intern will work closely with Cambridge's Public Relations and Creative Marketing Team to communicate with Continuity Partners members in regard to events and meetings and support website design projects and corporate social media initiatives. Desired attributes include: strong communication skills, an interest in writing, experience with PowerPoint and/or Prezi, and social media experience. Adobe Creative Suite knowledge desired, but not required.

*Ideal focus: Finance, Marketing, Communications, Graphic Design, or Business Management*

## **CLIENT SOLUTIONS INTERN**

To gain in-depth insight into the world of a broker-dealer, join the Client Solutions Team. The Client Solutions Intern will receive first-hand experience as to how Cambridge rep-advisors interact with their clients and prospects. The intern will be given exposure to a wide variety of investment and insurance solutions used to assist the advisor in obtaining the best client solution.

*Ideal focus: Finance, Economics, or Marketing*

## **COMPLIANCE INTERN**

The Compliance Department offers a unique opportunity that will introduce a student intern to a broad range of financial industry concepts and ideas. Specifically, the Compliance Intern will be exposed to different account and product types, as well as gaining experience working with other teams. Also, exposure to multiple areas within Compliance will give interns an industry career path adding value immediately should they choose to work in the financial services industry.

*Ideal focus: Business, Communications, Finance, or Legal*

## **DUE DILIGENCE INTERN**

The Due Diligence Team is offering an internship experience that will help a student develop a base knowledge and understanding of alternative investments that is difficult to obtain in a college classroom. This is a unique opportunity for anyone interested in real estate investment trusts (REITs), business development companies (BDCs), hedge funds, private equity funds, managed futures, and other alternative investments. Projects will include monitoring and analyzing alternative asset programs. The intern will receive access to a specific program's private placement memorandum (PPM), third party reports, and other due diligence materials. As a finale to the internship, the intern will be asked to research and make a presentation on a specific investment product. Desired skills include a basic knowledge of general financial theory and a strong desire to learn about practical applications of financial theory.

*Ideal focus: Finance, Economics, or Business*

## FINANCE INTERN

The Finance Intern will gain valuable knowledge in the Cambridge Accounting Department as they assist with the month-/quarter-end close process through compilation of financial statements and reconciliation of supporting schedules. In addition, the intern will assist with the creation of quarterly budget variance reports. Candidates must have completed intermediate accounting by the start of the internship. General knowledge of financial accounting and a desire to further knowledge of the accounting cycle is required.

*Ideal focus: Finance or Accounting*

## HUMAN RESOURCES INTERN

Build on classroom learning with this internship opportunity in the Human Resources Department. Not only will the Human Resources Intern own a project involving the creation of internship guides for managers, mentors, and students, but they will support continued company efforts to remain a Top Workplace<sup>1</sup>. Projects will include contributions to company committees, planning the all-company summer event, and working to improve The Next Step™ internship program. The intern must be proficient in Microsoft Office and Excel, and have taken some general HR courses.

*Ideal focus: Human Resources, Business Management, or Communications*

<sup>1</sup>*Des Moines Register*, "Top Workplaces 2011," September 18, 2011

## SOFTWARE ENGINEER INTERN

The Software Engineer Intern will be a participant on the Framework Application's Scrum Team and will complete a challenging project that will last the length of the internship. The intern will build an n-Tier application that may be used by both internal and external Cambridge users. They will develop the different layers of the application from presentation layer or UI using MVC, through the business services, to the data layer using NHibernate. The intern will learn and use the Agile methodology when working on the project. Test Driven Development (TDD) will be used to develop the project and Continuous Integration (CI) to build and deploy the project. NOTE: This position is located in our Norcross, Georgia office.

*Ideal focus: Computer Science, Engineering, or similar majors*

## BA/QA TECHNICIAN INTERN

The BA/QA Technician Intern will be part of a software development team working on designing, developing, and testing software features and components. Project work includes assisting with requirements clarification and documentation, writing and executing test plans, submitting defect reports, and collaborating with the team. The intern will participate in practices according to the Agile/Scrum software development methodology and may also employ automated testing tools. A general understanding of software development life cycle (SDLC) concepts and phases, as well as an understanding of relational database systems and knowledge of SQL are a plus.

*Ideal focus: Computer Science*

## APPLICATION PROGRAMMER INTERN

The Application Programmer Intern will be part of a software development team working on designing, developing, and testing software features and components. Project work will include web programming and business layer design and development. The intern will learn and use standard industry practices such as established coding conventions, writing unit tests, participating in code reviews, and pair programming. In addition, they will use Continuous Integration as well as participate in practices according to the Agile/Scrum software development methodology. The intern will use various technologies and tools from the following: C#, .NET Framework, ASP.NET, ASP.NET MVC, SQL, Visual Studio, MS SQL Server Management Studio, TeamCity, Team Foundation Server (TFS), and others.

*Ideal focus: Computer Science*

## LEGAL/RISK INTERN

The Legal/Risk Team offers a unique opportunity to research and analyze state and federal laws and self-regulatory organization rules. Projects include drafting letters, reports, memorandums, presentations, and basic contracts; data analysis and review; and interacting with other departments to help complete tasks, resolve issues, or improve processes and procedures. Candidates should be entering into at least their second year of an accredited law school program.

*Ideal focus: Law*

## **MARKETING INTERN**

The Marketing Intern will be exposed to a variety of different areas, including conference and event planning, that will help them learn how to market to different audiences including Cambridge advisors, recruits, and wholesalers. Primary responsibilities will include being the content owner for our event mobile app, providing support to the Education and Events Teams, and providing customer service to attendees. This experience will allow a student to gain knowledge in a fast-paced event planning and marketing environment within the financial services industry.

*Ideal focus: Hospitality (event planning), Business, Marketing, Finance, or similar majors*

## **OPERATIONS INTERN**

This intern will gain valuable experience working in the Operations Department at the broker-dealer level. The Operations Intern will serve as the liaison between our Brokerage and Direct Operations Teams. They will also get hands-on experience managing account paperwork, setting up new accounts, and researching held commissions and trade errors. The ideal candidate would be interested in joining the financial services industry and must have basic computer skills, including Microsoft Office Suite.

*Ideal focus: Finance, Management, Business, or similar majors*

## **OPERATIONS DEVELOPMENT AND TECHNOLOGY/TRADING INTERN**

The Operations Development and Technology (ODAT)/Trading internship will involve two placements within a broker-dealer. The intern will work part-time with the Trade Desk, and the other half of their time will be spent with the ODAT Team. There will be an opportunity to gain a valuable understanding of how specific operational roles contribute to the functioning of each department, while also analyzing productions, and being mindful of potential improvements to this ongoing process. This internship requires the ability to be detail oriented, organized, focused, and adaptable with good analysis skills. The ideal candidate will be curious about the financial services industry and will possess a positive attitude.

*Ideal focus: Computer Science, Finance, or Economics*

## **PARTNER SUPPORT INTERN**

The Partner Support Center internship will offer exposure to nearly 10 different departments within Cambridge. This is a great opportunity for someone who has completed their sophomore year, but has not decided upon their “final focus” such as finance, accounting, operations, or compliance. This internship with the Partner Support Center is a great way to help determine strengths and where their interests lie. Ideal candidates are enthusiastic and possess strong listening skills.

*Ideal focus: Business, Management, or Communications*

## **PROJECT MANAGEMENT INTERN**

Gain experience turning an idea into a real world project. At some point in their career, all business professionals are asked to run a project or lead an initiative. The Project Management Intern will gain experience in managing a real project and interacting in a business environment. In addition, the intern will participate in meetings, document project progress, and learn the importance of communication and teamwork in a project team environment. Over the course of the internship, the intern will have exposure to project methodology and tools to enhance project management skills.

*Ideal focus: Business Administration, Management, or Finance*

## **PUBLIC RELATIONS AND CREATIVE MARKETING INTERN**

Join the Public Relations and Creative Marketing Team to gain experience in a fast-paced public relations world. The intern will develop creative content for our clients, support Cambridge’s social media outlets, and develop promotional campaigns. A heavy focus on writing will be emphasized through executive ghost writing projects. Exposure to working with media and writing press releases will allow a student to put their classroom knowledge to the test. Ideal candidates are self-starters, well organized, and able to work under pressure.

*Ideal focus: Marketing, Communications, Journalism, Advertising, or similar majors*

## TECHNOLOGY CONSULTING INTERN

For a rewarding technology internship, join Cambridge's Technology Consulting Team for the summer. The Technology Consulting Intern will support vendor due diligence and vendor evaluation requests for new or existing vendors in the program. The intern will also work to enhance Cambridge's relationship with third party technology vendors through calls to discuss products and understand features and benefits. The intern will also be given ample opportunity to network with professionals in the technology and financial industries.

*Ideal focus: Computer Science*

## NOT INTERESTED IN A BROKER-DEALER?

Consider a client-facing internship at one of our rep-advisor's offices located across the nation. This opportunity would provide exposure to practical experience in a career that impacts people's lives. Internship opportunities include client and sales support, financial management, and future planner opportunities. In these roles, you will be given the opportunity to learn from successful industry experts.

*Ideal focus: Finance, Marketing, Business, or Communications*

Visit **The Next Step™ Facebook page** at [www.facebook.com/cambridgethenextstep](http://www.facebook.com/cambridgethenextstep) to learn more about the opportunities at Cambridge. Visit [www.joincambridge.com/careers](http://www.joincambridge.com/careers) to apply for one of our many 2013 internship opportunities.

# CONTACT Us

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