

2023 Summer Internship Posting

The mission of BDF LLC is to help people enjoy a full life. We live our mission every day. Our vision is to set the standard of unmatched excellence by attracting and retaining top talent in order to passionately serve our clients, through a culture of growth, innovation, and safety, anchored by our core values:

Humble
Team Before Self · Open to Feedback · Vulnerable · Gratitude
Hungry
Driven/Self-motivated · Going Above and Beyond · Hardworking · Dedicated
Smart
Inquisitive · Listen to Others · Good Intuition · Self-aware
Always Do the Right Thing

We are currently searching for a highly motivated, analytical individual to join us as an intern for the summer of 2023 in our Itasca office.

Our Internship Program Includes:

- Real-world exposure to:
 - Net Worth Statements
 - Retirement Planning
 - Investments
 - Insurance Planning
 - Tax Planning
 - Estate Planning
- Attend internal and client meetings in an observation and learning capacity
- Collaboration with the Wealth Management Team
- Completion of team and/or firm-wide projects

Learning Opportunities for You:

- Experience in investment management and financial advisory services
- Tax and investment knowledge
- Investment research skills
- Project management skills
- Presentation skills
- Professional business acumen and communication skills
- Introductory knowledge of planning software such as MoneyGuidePro, YCharts, Salesforce, etc.

Education and Experience Requirements:

- Enrollment in a bachelor's degree program in Financial Planning, Finance, Accounting, or Business Administration at an accredited higher learning institution.
- Completion of Junior year by summer 2023 with a minimum 3.0 GPA.

Additional Skills:

- Knowledge of MS Office Suite, particularly Excel and PowerPoint.
- Excellent communication and problem-solving skills.
- Strong organizational and time management skills.
- High level of attention to detail and accuracy.
- Strong work ethic and professionalism.

BDF is a fee-only, private wealth management firm with offices in Itasca and Chicago, Illinois. BDF specializes in working with business owners, women, widows, individuals and families, institutions, and non-profit organizations. BDF is ranked as one of the best places to work in 2022 by Investment News, Crain's Chicago Business, and the Daily Herald. Clients trust us to manage over \$5.9 billion in assets and we're honored to have a 98% client retention rate.

We want your accomplishments and goals to speak for themselves - please send your resume to broy@bdfllc.com

