



If Wall Street Could Talk: From Intern to Analyst Taylor Martin Finance Major, May 2020

Professional
Development

SUMMARY

During the Summer of 2019 I had another wonderful opportunity to intern for a second summer at JP Morgan in New York City, NY. This summer I worked as an Investment Management Summer Analyst within the Investment Solutions division (Private Client Wealth Management).

Specifically, I interned on what's called the Specialized Strategies Team where I assisted portfolio managers with researching and providing investment strategies to ultra-high net worth clients within New York, London, Madrid, Latin America, and Asia. Some of my duties included performing stock/ETF research, financial modeling, writing investments commentary, and providing daily portfolio performance updates. This experience offered me such a transparent perspective on portfolio management and how a portfolio is constructed. Upon entering the internship I learned that I would also be aligned to the business management team within Investment Solutions as well. As exciting as it was to have two experiences, I definitely faced many challenges along the way. However all and all I had specific goals I was trying to meet and I was able to achieve them greatly! I improved my public speaking skills, improved my financial technical competency, and worked to understand every function within the private bank. Because of these efforts, I am proud to say that I have accomplished each of these goals and have received a full-time job offer upon graduation. I am very thankful to have experienced this opportunity once again and I look forward to experiencing this full-time position.



SPICES

Related to professional development. I learned how to work amongst senior level management on a daily basis and how to network! Furthermore, I learned valuable technical skills such as financial modeling, utilizing macros within Excel, and how to become advanced in the creation of meeting slides and presentations.

HERBS

This experience I believe, embodies all of the HERBS categories. Throughout the internship we were always reminded about our fiduciary responsibility to the clients to provide trustworthy and ethical business and investment services as well as keep client information confidential, exemplifying honor. The wealth management field is all about building and fostering relationships amongst clients and team members requiring a benevolent and supportive work environment while being equitable in the distribution of power. Lastly, the internship taught me how to be resilient in an unfamiliar environment.

LEARNING OUTCOMES

During this experience, I learned so many valuable lessons. One of the most valuable things I learned was how to persevere through a tough, unforeseen situation. I also learned how to work amongst senior level management and how to adapt to different leadership styles. Additionally and most importantly I learned how to critically think through problems with very little information. These lessons have shaped me professionally and also interpersonally by pushing me to achieve more than I could have ever thought I would.



IMPACT

Although the internship had some challenges I was able to leave such a great impact on the team! For the month of June and July I was able to write the investments commentary for the team that gets published throughout the company and international offices. I also got to build a fixed income scenario analysis for the team to help them thoroughly view their fixed income investments and created a product strategy framework/platform for the Global Head of the investments team. Lastly, to finish up my internship I wanted to make sure that the next intern had a great experience and have a great start! So I developed a summer analyst guide that encompasses everything an intern will need to ensure they are successful!

ADVICE

My advice to anyone that faces this same predicament would be to play the cards you're dealt and WIN. No matter how unfair a situation may feel, or how undesirable the circumstance may be, stay the course, because when you can succeed in unfavorable conditions you can succeed through anything! There are specific experiences that are only meant to develop you, so allow yourself to be transformed and your true potential to be unlocked.