



**D | A | DAVIDSON**

## 2025 Wealth Management Summer Internship Program

At D.A. Davidson, we believe in the strength of advice. Summer Interns work directly with experienced Financial Advisors and other financial professionals, while learning about the financial services industry and our 89-year-old employee-owned firm.

The Wealth Management Summer Internship Program is a paid internship consisting of a minimum of 25 hours per week for 9 weeks, with the opportunity to glean valuable insight and wisdom from many industry veterans. You will be placed in a branch office where, over the course of the summer program, you will observe firsthand what it takes to run a successful, ethical practice serving individual investors' needs. You will also gain hands-on experience by collaborating on various projects that support our Financial Advisors and their clients.

Additionally, the program includes an immersive, action-packed week in our Seattle corporate office, where as a group you will interact and hear from Executive and Senior Leadership and Department Heads in all areas of the firm. The agenda will feature a variety of activities, including presentations, mock interviews, community service, and team building.

**If Wealth Management Research** is of interest, there is a Research track available within the Internship Program. Please apply for the Seattle, WA location and indicate your interest in research on your application. For the Research internship, you will work closely with our Wealth Management Research Department research in Seattle to help publish portfolio and market commentary. The Wealth Management Research intern will also help analyze university student run equity portfolios to support D.A. Davidson's Student Investment Program.

**All Interns** will have the opportunity to study and sit for the highly coveted FINRA Securities Industry Essentials (SIE) exam. Pending completion of the SIE, studying for and taking the Series 7 General Securities exam is also offered. This is an optional, yet unique and valuable licensing opportunity, not generally offered to current college students. **D.A. Davidson will sponsor you for test preparation and testing provided it is completed during the 9-week summer program.**

To summarize, this internship will provide you with opportunities to:

**Develop skills in wealth management**

**Build your professional network**

**Work directly with experienced  
Financial Advisors**

**Earn professional licensing**

**Qualifications:**

- Students must have completed at least sophomore year of college prior to June 2025
- Demonstrated strong academic performance and professional drive
- Excellent analytical, leadership, communication, teamwork, and service skills
- Authorization to work in the U.S.
- Satisfactory results of background, reference, and credit check
- Ability to commit to the duration of the program
- Live within the local area of branch office or have pre-existing arrangements to live in the area for the duration of the program. Transportation and/or moving assistance will not be provided.

**Locations for 2025 Wealth Management Branch Summer Interns:**

<b>Colorado Springs, CO</b>	<b>Roseville, CA</b>	<b>Helena, MT</b>
<b>Encino, CA</b>	<b>Missoula, MT</b>	<b>Bozeman, MT</b>
<b>Great Falls, MT</b>	<b>Seattle, WA</b>	<b>Lake Oswego, OR</b>
<b>Austin, TX</b>	<b>Spokane, WA</b>	<b>Omaha, NE</b>

**Next Steps**

We are accepting applications starting **September 16<sup>th</sup>** with a deadline of **November 1, 2024**. To apply, visit the Open Positions section of our [Careers page](#). If you are interested in applying to more than one location, you will need to submit an application for each corresponding job posting.

**Important dates:**

- September-November 2024 – Local interviews in person or virtual
- December 2024 – Final interviews for selected candidates and offers for finalists
- June 16, 2025 – Internship Program begins in respective branch locations
- July 2025 TBD – Intern week in Seattle
- August 15, 2025 – Internship Program concludes

For more information, contact Julie Schneider, Vice President - Director of New FA Training and Acquisition, at (360) 571-3721 or [jschneider@dadco.com](mailto:jschneider@dadco.com).