FRANKLIN P. PERDUE
SCHOOL OF
Business

ABLE Internship Program

Common Finance Major Activities

- Prepare research reports on publicly traded common stocks as assigned by the intern's supervisor.
- Prepare an evaluation of corporate bond ratings as assigned by the intern's supervisor.
- Prepare an evaluation of municipal bond ratings as assigned by the intern's supervisor.
- Assist with account reviews and preparation for account reviews.
- Update client portfolio values, returns, risk statistics.
- Develop Excel spreadsheets to show current Realized/Unrealized gains/losses.
- Gain understanding of portfolio diversification (i.e. fixed income, equities).
- Learn the duties of an escrow accounting department.
- Assist with balancing cases, preparing checks, disbursing checks and reconciling escrow bank accounts.
- Learn duties in preparation of settlement statement.
- Communicate with lenders to coordinate pre-closing and post-closing activities.
- Create financial review documents that outline what trades a client should make, and what financial moves they could take to achieve their goals.
- Learn the technical aspect of financial planning as well as the sales part of financial planning.
- Perform duties designed to provide experience and orientation in the financial, budget, and accounting processes of resource management and to develop familiarity with the practices, rules, regulations and other requirements of the organization.
- Share new technologies and methods gained from academic studies that will enhance the organization's work environment.
- Perform basic technical assistance work relating to financial, budget programs.
- Assist higher graded analysts and accountants.
- Create spreadsheets of budget and funding data for use by analysts.
- Make decisions based on a review or knowledge of similar cases or samples, or by selecting from among clearly recognizable alternatives.
- Use established instructions, practices, or precedents for processing budget documents and take action.
- Provide administrative and finance support.
- Assisting with research, filing, data entry, and recording and maintaining accurate and complete financial records.
- Preparing financial reports, such as balance sheets and income statements, invoices, and other documents
- Complete a reconciliation project between current inventory system and new inventory system. This will include contracts and agreements, approvals, billing, and reporting.
- Participate in weekly project and or department meetings.
- Assist with ad-hoc projects as needed.
- Work with Associate Vice President and Sr. Director of Finance.
- Get trained on budgeting module or relevant software; Sit in on trainings regarding wealth management.
- Complete financial analysis using programs and systems to support the yearly budget process. This will include reviewing growth projections, variance analysis, and identifying/researching industry drivers for several areas.
- Building out financial plans using proprietary planning software.
- Help with portfolio construction and analysis.
- Use CRM tools for tracking and reporting.

- Assist loan officer and processor with the work flow on each transaction, including requesting and obtaining financial documents from customers, following up with title and insurance companies, and providing status updates to realtors, builders, sellers, and borrowers.
- Assist Loan Officer/Manager with scheduling pre-qualification and application appointments.
- Assist Loan Officer with scheduling business development calls/appointments to include realtors, builders, and qualifying brokers.
- Assist with marketing to realtors, builders and clients.
- Assist Loan Officer with review of financial documents.
- Support functionally specific business processes as well as various programs and projects that require sophisticated reporting analytics.
- Prepare competitive analysis and benchmarking, product portfolio analysis and optimization, business process redesign and have all involved working across functions.
- Design packages that summarize weekly, monthly/quarter/year-end performance.
- Analyze financial trends against forecast and budget and explain key variances.
- Build financial models and conduct analytics from disparate sources.
- Provide detailed financial reconciliations and track financial performance for key strategic initiatives.
- Provide an integrated financial perspective on the impact of business decisions and decisions that maximize value for the business.