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Internship 2016
Morgan Stanley – Boca Raton, FL

My experience as an intern this summer was much more valuable to me than I anticipated. I spent ten weeks as a paid summer intern at Morgan Stanley Private Wealth Management in Boca Raton, Florida. During my internship, I lived in Florida Atlantic University housing. My apartment at FAU was about a ten-minute drive from the office. I was happy with the accommodations at FAU, and I would recommend FAU housing to future interns.

I was assigned to Michael Shapiro, the Financial Advisor with the most assets under control in the office. I quickly realized that it was a privilege to work for Michael. He kept me busy throughout the day and he was eager to teach me how to be successful in private wealth management. He allowed me to observe his meetings and conference calls with clients, accountants, and attorneys. Those meetings and calls were not only interesting, but also great opportunities to learn how a successful financial advisor conducts business.

Everyday I would arrive at the office at 8:30AM and work until 5:00PM, with a lunch break at 12:30PM. On a typical day, I would meet with Michael and his sales assistants at 8:45, at which point he would assign me work to do throughout the day. Generally, I would use the Morgan Stanley software system in order to generate executive portfolio summaries for clients, send out mailings, answer the phone for Michael, and work on tasks specific to the day. Michael would call me into his office whenever he had some spare time in order to talk to me about his work and impart some knowledge onto me.

During the course of my internship, I learned much more than I expected to learn. Michael taught me how to be successful in and out of the office. He explained the importance of networking and the proper way to network with different types of individuals. My experiences at

Morgan Stanley convinced me that I could be successful in private wealth management, but that it would be difficult to start a career as a financial advisor at a young age. I decided that if I ever do become a financial advisor, it would not be until I am much older. Before my internship, I thought that starting a career as a financial advisor right out of college could be a lucrative option. Now I know how difficult it would be to establish oneself as a financial advisor at a young age.