



BLatinX Internship, Inc.
The internship program for aspiring
Black and Latinx financial planners.

CORPORATE SPONSORSHIPS



Support the BLX Internship Program to bring more diversity to our profession.

By supporting this program, you will align your organization with a leading non-profit at the forefront of the diversity and inclusion movement.

KEY ACCOMPLISHMENTS FROM SUMMER 2021

- 38 interns were placed across 26 firms
- 20 interns were offered either part time or full time permanent positions
- Applicant pool from 27 states
- Overwhelmingly positive feedback from participating firms and interns

GOALS FOR SUMMER 2022

- 100 internship placements
- Expand the program to include scholarship opportunities for the CFP exam and admission to industry conferences
- Roll out career development training for interns
- Launch community for sponsoring firms
- Enhanced DEI training and support for firms

blxinternship.org | info@blxinternship.org

BLatinX Internship Inc. was founded as a 501(c)(3) nonprofit organization. All donations are tax-deductible within the guidelines of U.S. law.



“The BLX internship was an incredible experience for me from beginning to end.”

Tipiwa Walker
Intern
Wescott Financial

CORPORATE SPONSORSHIP LEVELS

	PLATINUM	GOLD	SILVER	BRONZE
Name and logo displayed on BLX website	X	X	X	X
Combined press release and inclusion in media campaigns	X	X	X	X
Partner mentions on BLX social media (LinkedIn and Twitter)	X	X	X	X
Partner promoted on BLX Diversity in Action podcast	X	X	X	X
Opportunity to provide educational materials and/or software licensing for BLX trainings	X	X	X	
Opportunity to host webinar for BLX trainings	X	X		
Prominent logo placement on BLX website	X	X		
Standalone press release	X			
Partner featured podcast interview on BLX Diversity in Action podcast	X			
	\$50,000+	\$15,000	\$5,000	\$2,500

In partnership with NAPFA and Advisor Business Solutions, Inc, this program was created by four fee-only financial planners who had a vision to change the complexion of the financial planning profession.

The BLX Internship Program is an initiative to provide an entryway into the profession for aspiring Black and Latinx financial planners. We also provide access to firms to reach a diverse pool of candidates.

Thus, the BLX Internship Program was born. Our goal is to place at least 100 aspiring Black and Latinx financial planners with meaningful paid internships for the summer of 2022. This program is open to both college students and career changers.

BLX PARTNERSHIPS

ADVISOR BUSINESS SOLUTIONS

Advisor Business Solutions specializes in wealth management consulting services including succession planning, advisor transitions, staff recruitment and practice management. Their 20+ year industry background offers the expertise and resources to deliver exceptional results and experiences to our clients.

Our team is incredibly passionate about creating hands on planning opportunities for diverse aspiring financial planners. BLX Internship aligns us with established planning firms needing a young, energetic, various talent pool for successful hiring. ~ **Suzanne P. Lawrence** | CEO

NAPFA

We were very intentional in deciding to partner with NAPFA and fee-only financial planning firms because we believe this model reduces as many conflicts of interest as possible. All four of the co-founders run fee-only firms and we believe this is the future of the financial planning profession.

“This grassroots effort fits seamlessly with our organization’s vision to become the standard for diverse advisors. We will proudly encourage our members to participate as part of our diversity & inclusion initiatives.” ~ **Geof Brown** | NAPFA CEO



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*Sourced from Financialadvisoriq.com written by Alex Padalka



BLX INTERNSHIP PROGRAM ACCOLADES

“BLX provided us with a talented pool of candidates to select from that matched Wescott’s core values and passion for financial planning. Both Wescott and BLX share the same vision to bring greater diversity to the profession. Not only are we grateful to be a part of this innovative program, we are very proud that we were able to make our intern a full-time member of our Wescott family!”

**Chris Cortese, CFP® | Wescott Financial Advisory Group
Philadelphia, PA**

“It was nice to have a few interns to choose from and I was pleasantly surprised with the quality of the candidates I was matched with. My intern was a great culture fit for my firm, which was due to the in-depth matching process.”

**Deborah Meyer, CFP®, CPA/PFS, CEPA | CEO of WorthyNest®
Punta Gorda, FL**

“I signed up our firm for the BLX program hoping to find a well-qualified intern for a limited period, but he has exceeded my expectations and I’m now aiming to eventually keep him on as a full-time member of our team serving clients on his own once he’s ready.”

**Steven Fox, CFP®, EA | President - Next Gen Financial Planning, LLC
San Diego, CA**

“Overall, I feel incredibly lucky to have been a part of the first cohort of the BLX internship. I was paired with Abacus Wealth Partners in Santa Monica. Abacus set up my multiple weekly meetings with people across the industry and allowed us to sit in on every type of company meeting, including board meetings. This gave me an amazing perspective on what’s happening across the company and the industry as a whole. One day, I was even asked to interview one of our guest speakers in front of many people in the company. That was truly a great experience for me. Abacus went above and beyond during the internship experience. And I think that the internship being remote added the most value because we wouldn’t have been able to meet so many people in the field without it. In the end, I received a full-time position from the company and I’m so excited to start!”

Uchechi Kalu | Intern, Abacus Wealth Partners

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**Uchechi Kalu
Intern**

Abacus Wealth Partners