



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

**FIRM
SPONSORSHIPS**



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 opportunity to aspiring Black and Latinx financial planners to find out what financial planning is all about.

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.

HOW IT ALL BEGAN

In the wake of George Floyd's death, and in the spirit of the Black Lives Matter movement, the BLX Internship Program was born. Our goal is to provide an opportunity for aspiring Black and Latinx financial planners to obtain an internship at a fee-only financial planning firm.

The financial planning industry is woefully underrepresented from a diversity standpoint. In fact, 73% of Certified Financial Planners are white males.* We believe that in order to move the financial planning profession forward, we must be more representative of the population of our country.

OUR PARTNERSHIP WITH 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.

We are thrilled to partner with NAPFA to amplify this movement and expand the reach of this program. NAPFA is the National Association of Personal Financial Advisors and they represent over 4,000 members across 2,300 unique 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.

*Sourced from Financialadvisoriq.com written by Alex Padalka



Support the BLX Internship Program with empowerment for bringing diversity and inclusion at your growing firm.

Our organization will provide an engaging process including dedicated relationship managers, strong financial planning candidates, talent assessments and firm matchmaking with pre-qualified intern candidates to align with fee-only financial planning firms nationwide.

BLX FIRM BENEFITS

Access to Pre-Screened Candidates

College Students

Juniors, Seniors, Graduates

Major or Areas of Concentration

Financial Planning

Finance

Accounting

Work Experience Includes

Accounting

Tax Preparation

Banking Services

Career Changers

Graduates

CFP Candidates

BLX FIRM SPONSORSHIPS

Dedicated Relationship Managers

Firm Needs Assessment

Intern Candidate Matching

Access to Talent for Future Hiring

Diversity & Inclusion Training & Best Practices

Firm Name Displayed on BLX Website and Social Media

Internship Resources

- Hiring Resources & Sample Documents
- Onboarding Toolkit & Guidance
- Firm Webinars & Trainings
- Intern Webinars & Trainings
- Online Community for Participating Firms

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

Tipiwa Walker
Intern
Wescott Financial

BLX FIRM SPONSORSHIP LEVELS

FIRM TYPE	FIRM SIZE DESCRIPTION	NUMBER OF INTERNS	SPONSORSHIP (MINIMUM)
Solo Practice	Independent Financial Planner Local area office	1	\$1,000
Small to Mid Size Team	Financial Planning Team with less than 10 team members Local area office	1	\$1,500
Large Team	Financial Planning Team with 10 to 20 team members Local or regional offices	1-2	\$2,500
Enterprise Firm	Financial Planning Team with more than 20 team members or \$1 billion of assets under management Local, regional, or national offices	3-5+	\$10,000*

*The minimum sponsorship amount is \$5,000 for enterprise firms who are interested in hosting 1-2 interns.

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BLX ACCOLADES

“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

“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**

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**Uchechi Kalu
Intern**

Abacus Wealth Partners