



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

## **INTERNSHIP PROGRAM**



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 get visibility into what financial planning is all about. Each one of us in the profession got our start somewhere. This program is designed to get your foot in the door to the profession to learn about personal finance and gain real-world experience from participating firms.

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.

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### 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.



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[blxinternship.org](https://blxinternship.org) | [info@blxinternship.org](mailto: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



## BLX INTERNSHIP BENEFITS

This internship will give you an opportunity to learn about financial planning first-hand from a fee-only financial planning firm. You will have the opportunity to develop your soft skills, financial skills, and your own network of high-achieving professionals. You will join a community with access to a tailored program ahead of, and during, the internship to ensure you learn as much as possible from the experience.

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### Requirements to participate:

This program is open to both students and career changers.

- You must identify as Black or Latinx
- You must be eligible to work in the US
- If you are a student, you need to have at least completed your Sophomore year in college (entering your Junior or Senior year)
- Grad students and career changers are also eligible.
- You must pass a background check. This is a serious profession with high ethical requirements and the need to maintain client confidentiality is paramount.
- You must submit a resume
- You must have a GPA of 3.0 or higher. We require a copy of your unofficial transcript

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

**Tipiwa Walker**  
Intern  
Wescott Financial

# FAQ'S

## HOW DO I APPLY?

Please submit your application at <https://blxinternship.org/apply> for why you are a good fit for this program. Please keep in mind that you apply to the BLatinX Internship Program (BLX) as a whole, rather than to a specific firm that is participating. You can find a full list of the participating companies on our website.

**THE APPLICATION DEADLINE IS DECEMBER 20TH, 2021 AT 11:59PM PST.**

## WHEN WILL THE INTERNSHIP OFFICIALLY START?

The formal kickoff date aligns with a normal summer internship schedule. After interns are hired by a firm, it is up to the two parties to decide on the best start date.

## WHEN WILL I KNOW WHETHER OR NOT I HAVE SECURED AN INTERNSHIP?

You should expect to know whether you have been successful by the end of February, but likely before. If you do not secure an internship, please do not be discouraged. The program is highly competitive and you can apply again next year.

## DO I NEED PREVIOUS EXPERIENCE?

No, you do not. However, a demonstration of required skill sets such as work ethic, curiosity and initiative are extremely important. This can be shown through blogging, previous internships, society involvement, etc. Don't be modest in bragging about yourself!

## WILL THIS BE A PAID INTERNSHIP?

Yes. Firms are committing to paying at least \$15/hour.

For additional questions about the BLX internship program, please visit [www.blxinternship.org](http://www.blxinternship.org)

## 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**