



University of Lucknow  
लखनऊ विश्वविद्यालय

प्रो. संजय मेधावी, निदेशक  
केन्द्रीय प्लेसमेंट सेल

Prof. Sanjay Medhavi, Director  
Central Placement Cell (CPC)



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## Wise Wealth Management Internship Program

### About Wise FinServ Pvt Ltd

The birth of Wise FinServ evoked when many corporates started having a product centric approach to meet organisational goals rather than having a client centric approach to meet client financial goals. The journey of financial planning & investment advisory services at Wise FinServ started when two like-minded, senior, qualified, experienced wealth manager Ajay Kumar Yadav & Charu Pahuja thought to render Financial Planning Services across the country by leveraging technology platform & setting up high standards of practicing financial planning. The objective was not only to grow the balance sheet of company but also to spread right financial planning among people as social responsibility.

**Wise FinServ** is a Financial Planning , Investment Advisory and a Wealth Management company **registered with SEBI as an Investment Advisor**. We work towards assisting our clients in planning and executing their future financial goals . Our dedication in serving our customers has been paramount and hence we have been on a mission to spread financial literacy in India . We are soon going to launch our new online platform **Wise Funds** that will assist our customers to buy most financial products available to retail clients . These products like Mutual Funds , Life Insurance & Health Insurance help our customers to build , grow and protect their wealth . The main theme behind this platform for us is to connect & empower the Indians about the importance of Financial Freedom and Financial Planning.

### What you'll do

If you are participating in our Wealth Management Internship, you'll gain exposure to every facet of wealth management, including investments, lending, banking, and trust and estate planning. During our Investment Solutions Internship, you'll work with specialists to help research, analyse, and develop global investment strategies and opportunities for our clients.

### Who we're looking for

Valued qualities We're looking for highly motivated students with a unique blend of interpersonal and analytical skills. You should have a genuine interest in financial markets, investing and macro-level economics as well as energy, confidence and the

ability to take initiative. You'll also have good judgment, discretion working with confidential information and integrity.

### **Key skills**

You'll need excellent communication and presentation skills, strong quantitative skills, a passion for investing, exceptional organizational skills and the ability to multitask. We're looking for those with diverse backgrounds who can genuinely connect with our clients.

### **What We offer**

As a Wealth Management Intern, you'll work with our Wealth Management team and Investment specialists to bring in new clients and to serve existing ones. We deliver highly customized and comprehensive solutions to help protect, manage and grow wealth. No client has identical goals, so understanding their unique needs and tailoring our approach to exceed expectations requires work across teams and the firm to provide the highest client service. Working in Investment Solutions, and depending on your team, you may advise on financial strategies, build investment portfolios, provide research and analysis, or assist with product development.

### **Training**

In this nine-week program, you'll start with a three-to-five-day orientation to introduce you to the firm and our business. Throughout the internship, you'll attend senior speaker events, skills-building workshops and networking opportunities.

### **Career Progression**

Our Wealth Management Analyst program can serve as a launch pad for your career. Interns who successfully complete the program may receive an offer of full-time employment.

### **Applications**

Interested students may submit their applications on the following link by 7<sup>th</sup> March 2022:

<https://forms.gle/Du9XmLipiAHATTt68>

Thanks & Regards

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**Tanya**

HR & Operation Executive  
Investments Product & Services

**Wise FinServ Pvt Ltd**

Website: [www.wisefinserv.com](http://www.wisefinserv.com)