RUSSELL CAPITAL INTERN PROGRAM

The internship program at Russell Capital is a structured learning experience geared towards allowing our interns to obtain real-world investment experience. As an intern, you will gain exposure to a corporate office setting, become familiar with the responsibilities and daily duties of investment advisor, and complete tasks essential to the workings of the firm.

A BUSY FIRST TWO DAYS

All interns are understandably a bit nervous on their first day; we try to make this new experience as easy as possible for you. Our administrative staff is experienced in working in the intern program and will be there to help you through the entire program.

On your first day, you will receive an intern welcome folder that includes the following:

- A checklist of items that you'll need to accomplish in your first week
- Floorplan of the office
- Short bios and pictures of advisors and staff
- Mock Client Portfolio
- Privacy Agreement

PROJECTS/RESEARCH

You will complete two projects that span the length of your internship and culminate on your last day with a presentation to the advisors. You will also be assigned other projects on an as-needed basis depending on the needs of the advisors.

- Research Project - you will develop and research a unique investment strategy to be presented at an advisor lunch meeting. Keith Day, Russell Capital's financial analyst and intern coordinator, will work closely with you to pick a topic and develop the strategy.
- Mock Client Portfolio - an overview is included in the welcome folder. This project is designed to give you glimpse of the responsibilities of an investment advisor, as well as give you practice presenting your results to a "client". You will work on this throughout your internship and present your portfolio in a role-play exercise to a Jack Russell, Founding Partner and Principal, on the last day of your internship.
- Depending on the needs of the advisors during your internship, you may receive a securities research project that enables you to learn the basics of investment research as well as provide a benefit to the advisor. You may also assist in our ongoing investment strategy research such as our proprietary Advanced Strategies and Select Account investment programs.

MEETINGS DURING YOUR INTERNSHIP

As your school schedule allows, you will be invited to attend the following meetings during your internship (please note, these meetings are not mandatory – you will not be able to attend client meetings):

- Monthly advisor lunch meetings. In these meetings we discuss trusts, investment research, investment ideas, retirement plan management, technology, and a myriad of pertinent subjects.
- Quarterly investment committee meetings where each advisor presents on one or more investing topics, explaining the quarterly returns and giving their opinions on future activity. We cover the

topics of stocks, sectors, bonds, international investing, commodities, interest rates and alternative investments, among others.

- One-off lunch meetings with solicitors of our business such as retirement plan providers and mutual fund and annuity wholesalers
- Office functions such as dinners or receptions