



President's Address



OUR SUMMER INTERNS

ROBERT G. CARPENTER
President & CEO
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This summer, we celebrated the 10th Anniversary of our Institute & Internship Program with our 2022 team of eight bright and talented interns.

The goal of our summer intern program is to provide the students with mentorship and guidance as well as meaningful work experience that provides a glimpse into the everyday operations of a financial services company. We work diligently to provide the best service to our clients, and the students have helped achieve this goal.

Over the past few months, the interns worked on a number of various tasks and projects supporting both the Investment Management and Financial Planning departments including calculating draw rates, tracking economic recession and recovery trends, and creating the firm's **Divorce Mediation** web page. They also collectively researched and authored a white paper titled, "**How to Fix Baltimore City, Maryland: A Detailed Analysis**".

We are so thankful to have had this wonderful team work with us this summer! **Thank you to Hailey, Shane, Cierra, Hannah, Jack, Caroline, Grace, and Brandon** — we wish you every success as you return to school!

Sincerely,

Robert Carpenter

President & CEO



DO YOU KNOW A COLLEGE STUDENT LOOKING FOR A PAID INTERNSHIP?

Baltimore-Washington Financial Advisors invite current college students to a virtual workshop to learn about paid Internship opportunities.

Do you know a college student interested in exploring career opportunities in financial services? Help them prepare for the future by introducing them to BWFA. Baltimore-Washington Financial Advisors is a nationally recognized, fee-only, wealth management firm. Since 1986, BWFA has been providing investment management, financial planning and tax services as a fiduciary.

✓ TOPICS WILL INCLUDE:

- > Overview of Financial Services
- > Investment Management
- > Financial Planning
- > Business Services (M&A)
- > Tax Services
- > Client Service
- > Marketing
- > Hospitality
- > Graphic Design
- > Social Media
- > Technology

 BWFA Internship Virtual Open House
FRI., NOVEMBER 18, 2022 • 11:45 AM – 1:00 PM

TO REGISTER, EMAIL CORTNEY CARONNA AT
CCARONNA@BWFA.COM

Learn more about the BWFA INSTITUTE & INTERNSHIP program at BWFA.com/bwfa-institute-internship



BIWIFIA

BWFA INSTITUTE – CLASS OF 2022

Among various projects, the interns collectively researched and authored a white paper titled, “How to Fix Baltimore City, Maryland: A Detailed Analysis”.

Read their insightful findings and proposal at [BWFA.com/bwfa-institute-internship](https://www.bwfa.com/bwfa-institute-internship)



HAILEY SCHENDEL

My name is Hailey Schendel, and I am a rising Junior at Gettysburg College studying Business Organizational Management and Writing. My interests outside of school include boating with family and friends, cooking, being outdoors, and working out. My second summer interning at BWFA proved to be another amazing experience. It provided me with greater insight into the different aspects of business within the financial planning industry. I was able to further develop my leadership and communication skills. I am grateful for this opportunity and glad to have worked for an admirable team that pushed me towards success while assisting me along the way.



SHANE PAUL

My name is Shane Paul, and I am a rising senior at The Catholic University of America in Washington, DC. I am currently studying finance and sales at The Busch School of Business in addition to being a member of the football team. In my free time, I enjoy playing golf, traveling, cooking, and working out. Throughout my time at BWFA, I was able to experience and complete tasks in all areas of financial services. Having such a willing, friendly, and encouraging group of co-workers allowed me to learn firsthand and feel the freedom to ask anyone, anything at all times. I cannot thank the staff enough for the experience they helped provide me this summer.



CAROLINE PADGETT

My name is Caroline Padgett, and I am a rising Junior at Duquesne University. I am majoring in Accounting and minoring in Spanish and Finance. I am involved in the Delta Sigma Pi fraternity and have recently been elected to join the Beta Gamma Sigma honor society. Outside of school, I enjoy reading, spending time with friends, and exploring Pittsburgh. This summer has been an amazing experience interning with BWFA. I learned valuable skills that I will take with me as I pursue my future career, and I got to work on various interesting and fun projects. I am so grateful for this opportunity to work with my fellow interns and the talented professionals at BWFA.



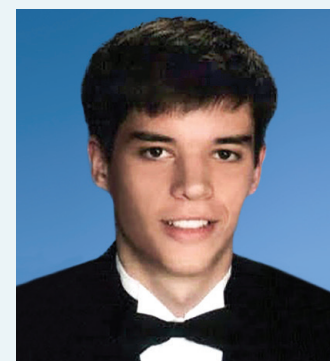
CIERRA BARKLEY

My name is Cierra Barkley and I am a rising senior at Hartwick College majoring in Business Administration and minoring in Biology and Legal Studies. My hobbies include playing tennis for the Hartwick College team and creating social media content for Hartwick’s Student Government Association. I am very thankful for the internship at BWFA. The opportunity to assist the various teams opened my mind to other areas of interest I may not have considered before. The knowledge and skills I gained will be a great asset in my future career. I plan to pursue a career in corporate, insurance, and medical malpractice law. After graduation, I hope to travel for a year before beginning law school.



HANNAH WASSON

My name is Hannah Wasson, and I am a rising senior at Gettysburg College pursuing a major in Economics and a minor in Data Science. I am from Nazareth, Pennsylvania. Some of my hobbies outside of school include swimming, hiking, spending time with family and friends, and traveling. I am thankful for the opportunity and experience interning with BWFA this summer. The entire team was involved in mentoring us. We were given individualized projects throughout the program that helped us identify and understand our strengths. With the knowledge and skills I learned at BWFA, I hope to discover my niche and focus my Gettysburg College studies on a career I am passionate about.



JACK FAUNCE

My name is Jack Faunce, and I’m a sophomore Finance and Classics major at the University of Maryland. I’m from Eldersburg, Maryland, and attended Liberty High School. I love playing basketball, reading, hiking, history, and weightlifting. I had a great summer at BWFA, getting to know and work with everyone. I gained experience and knowledge in the selling process for small/middle market businesses by assisting Brian Macmillan in M&A. I also had the opportunity to work on the operations side with the Client Service Team. The internship was an invaluable experience and a significant step forward in my pursuit of a career in the financial services industry.



GRACE TIDERENCHEL

My name is Grace Tiderencel, and I am from Binghamton, NY. I am a rising senior studying Finance and Business Analytics at the Martin J. Whitman School of Management at Syracuse University. I plan to graduate in May 2023 with a Bachelor of Science degree. Aside from academics, I am the Director of Financial Operations within my sorority chapter and a member of the Syracuse University Dance Team. I am extremely grateful for the summer at BWFA. After working closely with the staff, I gained a deeper understanding of the financial industry. The new skills and knowledge I learned will be a huge asset going into my senior year.



BRANDON PIERPONT

My name is Brandon Pierpont, and I am a rising Senior at High Point University majoring in Finance with a minor in Healthcare Management. I am on the Division 1 Lacrosse Team and a part of the Big Brothers/Big Sisters Program. In my free time, I enjoy working out, spending time with friends and family, and going to the beach. I am thankful for the opportunity to have worked at BWFA this summer. It was a challenging and fun experience. The team was very welcoming, supportive, and helpful. I learned multiple aspects of the financial industry and wealth management, working on tasks such as stock research, creating draw rates, and completing assessments.