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INSTITUTE

THE INTERN EXPERIENCE AT BWFA

Cultivating Future Financial Leaders

At BWFA, we are passionate about investing in the next generation of financial professionals. Our internship program is designed to offer students far more than just a summer position—it's a deep dive into the world of financial services, combining practical learning, professional mentorship, and impactful, real-world assignments.

Each intern at BWFA is paired with a dedicated mentor, ensuring personalized guidance throughout the program. Interns are embedded across BWFA teams, including Financial Planning, Tax, Investment Management, and Client Services, giving them a well-rounded experience in the day-to-day operations of a leading financial firm.

As Client Associate Interns, students work closely with our Client Service team while collaborating on specialized tasks with other departments. Their responsibilities are diverse and dynamic, ranging from processing service requests and preparing meeting materials, to maintaining our contact management systems. Interns also receive hands-on training in organizing documentation, communicating through multiple channels, and gaining valuable insight into the full client experience.

A hallmark of the internship is the BWFA White Paper Project, an intensive research assignment led by President & CEO Rob Carpenter. Each semester, interns work together to explore a timely and impactful topic—often related to unlocking potential and progress in our country. This capstone initiative requires critical thinking, collaboration, and creativity, pushing interns to apply their academic knowledge to real-world challenges while making

a lasting contribution to our firm. *Be sure to read the October 2025 issue of Advisor to learn more about this year's White Paper Project!*

Throughout the program, interns are encouraged to explore their interests, ask questions, and engage with the full spectrum of the financial industry. They contribute to high-impact projects such as market research, portfolio analysis, website content creation, and the development of client-facing materials. Many interns also attend client meetings, gaining firsthand exposure to the consultative and strategic side of wealth management.

At BWFA, we aim to tailor the internship experience to each student's strengths—whether those lie in data analysis, communication, technology, or design. Our collaborative, educational environment prioritizes both personal and professional growth, providing interns with the tools, experiences, and confidence they need to succeed in their future careers.

We're proud of the interns who join us each semester and even more excited to see where their journeys lead next.

Learn more about BWFA's
internship program:
[BWFA.com/bwfa-institute-internship](https://www.bwfa.com/bwfa-institute-internship)



BWFA's 2025 summer interns.



EDDIE AGUILAR

Eddie Aguilar is a rising senior at Syracuse University, dual majoring in Finance and Accounting. He is active in the Investment Club and manages his own portfolio. Outside academics, he enjoys working out, traveling, and sports. Eddie is excited to intern at BWFA to gain hands-on experience and expand his finance knowledge.



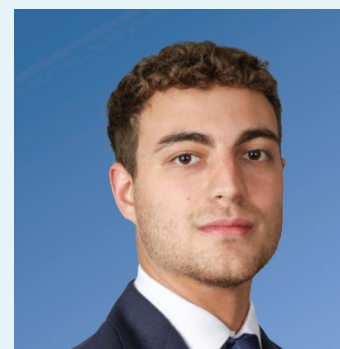
TADEO ASPRELLA

Tadeo Asprella is a junior at Goucher College, double majoring in Business Management and Economics. He plays on the Men's Tennis Team and serves as an Arsht Presidential Diplomat. Tadeo enjoys traveling, working out, and visiting family in Argentina. He looks forward to contributing to BWFA and learning from experienced professionals.



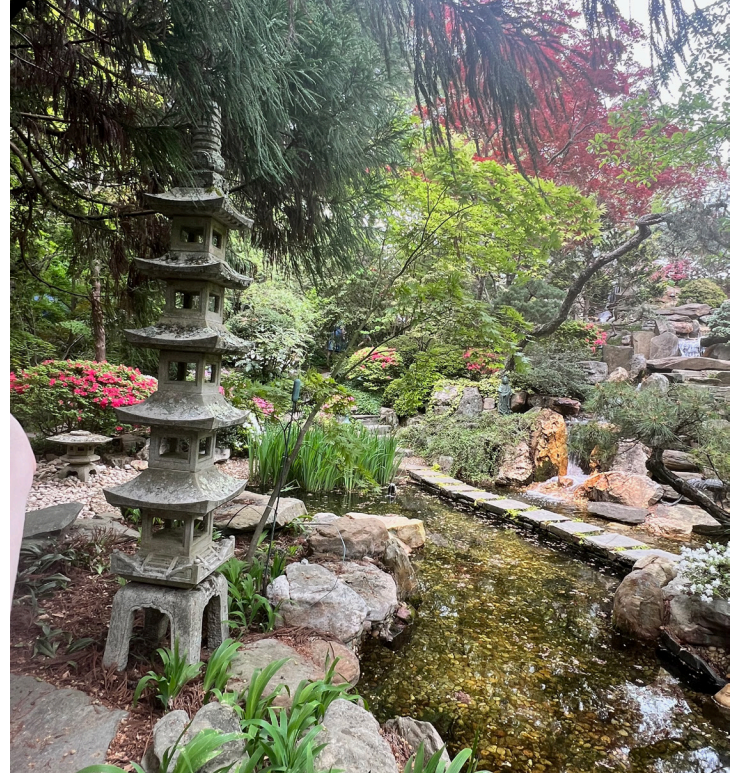
HAIDER DAR

Haider Dar recently graduated from the University of Maryland with a degree in Economics and holds an associate degree in Accounting. He was involved in the Real Estate Club and other campus organizations. Haider enjoys running, tennis, and traveling. He worked at BWFA as a spring intern and is eager to continue building his skills.



LOGAN DUNN

Logan Dunn is a junior at the University of Maryland's Smith School of Business, double majoring in Finance and Accounting. He participates in several intramural sports and enjoys outdoor activities and reading. Logan looks forward to gaining professional experience and contributing to BWFA.



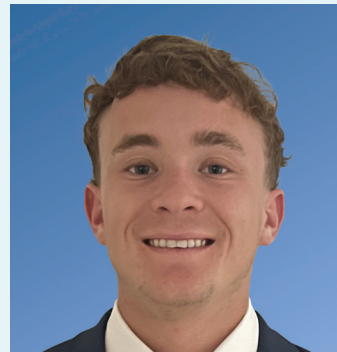
CAYLAH KANG

Caylah Kang graduated from UMBC in May 2025 with a degree in Financial Economics and a minor in Entrepreneurship. She began as a spring intern at BWFA and is excited to continue through summer, gaining hands-on experience in finance. Outside work, she enjoys time with friends, family, and new adventures.



MYA LALIBERTE

Mya Laliberte is a rising senior at Bates College, majoring in Political Science and History with a Pre-Law focus. She serves as Secretary of the Student Government and studied abroad in Milan, interning at a legal firm. Mya enjoys running and exploring new places.



JACKSON LEVINE

Jackson Levine is a rising junior at the University of Tampa, majoring in Finance. He competes in Cross Country and Track & Field and participates in the Entrepreneurship and Real Estate Clubs. Jackson also works part-time with the Athletic Department and enjoys traveling and staying



CHARLIE MALLOY

Charlie Malloy is a rising senior at Wake Forest University, studying Economics with minors in Psychology and Latin. He has previous experience analyzing private equity funds and leading youth development at a Christian summer camp. Outside of school, Charlie enjoys hiking, playing soccer, and hanging out with friends and family.



The Japanese-style garden at Hillwood Estate.



LOYOLA
UNIVERSITY MARYLAND

MARK MCALLISTER

Mark McAllister is a rising sophomore at Loyola University Maryland, studying Accounting with a minor in Information Systems. He leads trips through the school's Outdoor Adventure program. Outside of school, he enjoys fishing, camping, and time with family. Mark is excited to join BWFA and learn about financial services.



**UNIVERSITY OF
MARYLAND**

BROOKE SMITH

Brooke Smith is a rising senior at the University of Maryland, majoring in Finance with a minor in Real Estate. She's earning her Master's in Finance through the Plus 1 program. Brooke is involved in Sigma Delta Tau and the Global Equity Investing Fund. She's excited to intern with BWFA.



BWFA summer interns working together on a project.