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INSTITUTE

THE INTERN EXPERIENCE AT BWFA

Cultivating the Next Generation of Financial Leaders

At BWFA, interns play an active role in shaping the financial world.

For many college students, an internship means fetching coffee and sitting in on the occasional meeting. At BWFA, the experience looks quite different.

The firm's internship program is built on a simple but ambitious premise: treat interns as emerging professionals, not temporary help. From day one, each student is paired with a dedicated mentor. Interns are embedded across Financial Planning, Tax, Investment Management, and Client Services, gaining a panoramic view of how a leading wealth management firm operates.

This year marks a milestone for the program: for the first time, BWFA has expanded its intern cohort beyond finance to welcome students specializing in marketing and technology solutions.

This shift reflects the increasingly multidisciplinary nature of modern wealth management and the firm's commitment to building well-rounded, future-ready teams.

Serving as Client Associate Interns, students work closely with the Client Services team while collaborating on firmwide projects.

Their responsibilities are as varied as they are substantive: processing service requests, preparing meeting materials, maintaining contact management systems, and developing a firsthand understanding of the full client journey. This kind of well-rounded exposure simply can't be replicated in a classroom.

Perhaps the program's most distinctive element is the BWFA White Paper Project—a rigorous, semester-long research initiative led by President & CEO Rob Carpenter. Each cohort of interns tackles a timely, meaningful topic, often centered on unlocking economic potential and progress.

The project demands critical thinking, collaboration, and creative problem-solving, challenging students to bridge academic theory with real-world application. The result is a lasting contribution to the firm—and a formative professional experience for the interns themselves. (Read more about this year's White Paper Project in the October 2026 issue of Advisor.)

Beyond the capstone, interns contribute to high-impact work across the firm: market research, portfolio analysis, website content development, and client-facing materials. Many also attend client meetings, gaining rare insight into the consultative and strategic dimensions of wealth management.

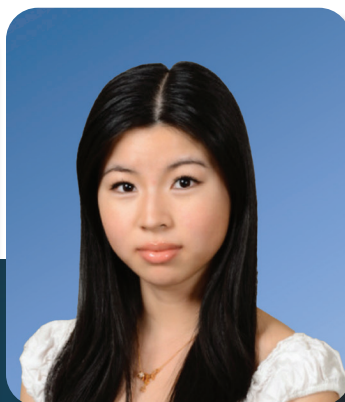
BWFA's approach is deliberately individualized. Whether a student's strengths lie in data analysis, communication, technology, or design, the program is shaped to meet them there — fostering both personal confidence and professional capability.

"We're proud of the interns who join us each semester," says BWFA CEO Rob Carpenter, "and even more excited to see where their journeys lead next."

“This kind of well-rounded exposure simply can't be replicated in a classroom.”



Interns participate in a discussion with Wealth Management Associate Terrence Jones during their first week at BWFA.



Carnegie Mellon University



Peyton Bauer is a rising senior at West Virginia University, majoring in Finance with an emphasis in Investments and a minor in Professional Sales. She is excited to join BWFA this summer and gain real-world experience in wealth management and financial planning services. Outside of school, Peyton enjoys traveling, staying active, and spending time with friends and family.

Oleksandra Bilichenko is pursuing her Master of Science in Finance at Johns Hopkins University, having earned her bachelor's degree in psychology with a minor in Entrepreneurship from the University of South Florida. She is passionate about wealth management and investment research. Oleksandra has experience in financial analysis through her work with a startup and is excited to continue developing her skills at BWFA. Outside of school, she enjoys volleyball, traveling, and family time.

Sofia Chen is a rising senior at Carnegie Mellon University, majoring in Business Administration with a concentration in Finance and a minor in Statistics and Data Science. At Carnegie Mellon, she is involved in Smart Women Securities and Kappa Alpha Theta. In her free time, Sofia enjoys exploring different cafes and practicing hot yoga. She is excited to contribute to the BWFA team and gain practical experience in the financial advisory field.

Noah Greenbaum is a rising senior at Binghamton University School of Management majoring in Finance. He previously interned at Seaport Research Partners, supporting equity strategy and quantitative research. On campus, Noah serves as Co-President of the TAMID Group and is an EY Student Leader. Outside academics, he enjoys graphic design, sports, and spending time with friends and family. Noah is excited to intern at BWFA and learn about wealth management.



BWFA's 2026 summer interns.



Claire Leety is a rising senior at the University of Miami, majoring in Advertising Management with minors in Communication Studies and Anthropology. She is excited to apply her skills as a marketing intern at BWFA and learn more about financial advising along the way. Outside of work, Claire enjoys spending time with friends and family, traveling, and cheering on the Hurricanes, Ravens, and Orioles.

Mark McAllister is a junior at Loyola University Maryland, studying Accounting. He plans to earn his Master's of Accounting in 2028 with the 3+1 program at Loyola. Outside of school, he enjoys cycling and camping. Mark began as a summer intern at BWFA last year and is excited to learn more.

Ismail Mustefa is a recent graduate of the University of Maryland, where he majored in Computer Science and minored in Geographical Information Science. As BWFA's technology intern, he brings a passion for data and innovation to the team. He enjoys building projects around open-source data, such as NFL combine statistics and satellite imagery. His hobbies include hiking, soccer, and trivia.

Sameer Nasir is a rising senior at the University of Maryland, College Park, dual-majoring in Finance and Accounting. Sameer enjoys exercising, trading, and exploring the outdoors. He is excited to gain more hands-on experience in financial advising and looks forward to contributing to a meaningful organization.



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Learn more about
BWFA's internship program:
BWFA.com/bwfa-institute-internship



THE UNIVERSITY OF
ALABAMA

 UNIVERSITY OF
MARYLAND

Jameson Pierpont is a rising junior at the University of Alabama, majoring in Finance. He is an active member of the Alabama Finance Association and Sigma Pi. Jameson enjoys traveling and spending time with friends and family. He is excited to intern at BWFA to build firsthand experience and deepen his knowledge of finance.

Brooke Smith graduated from the University of Maryland and is enrolled in UMD's Plus One program, pursuing a Master's in Finance. At UMD, Brooke was involved in her sorority, Sigma Delta Tau, as well as the Global Equity Investing Fund. Outside of academics, Brooke enjoys working out, spending time with friends, and playing tennis. She looks forward to learning more about financial services and contributing to the team this summer!

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