

Intern Spotlight: Jack Partovi

Currently a finance student at Santa Clara University, Jack Partovi joined Arnerich Massena as an intern this summer to learn more about different aspects of the business. He's helped out in the Analytics group, with the Operations team, in Business Development, and in Performance Measurement. In this spotlight, we take a look at what inspires and informs him; what drew him to this industry, what his future plans are, and the resources he draws on to meet the challenges of his work every day.



Jack Partovi

What's your role as an intern?

As an intern, my role primarily involves assisting the advisory team in various aspects of wealth management, including conducting market research, analyzing investment opportunities, and supporting client engagement.

What interests you about this type of work?

I have always been fascinated by the world of finance and investments. The opportunity to be a part of a team that helps clients navigate complex financial decisions and achieve their financial goals is incredibly rewarding.

What do you enjoy most about your job?

The aspect I enjoy most about my internship is the exposure to real-world scenarios in wealth management. Working alongside experienced professionals, I get to see firsthand how financial strategies are tailored to individual clients' needs and aspirations.

What has been your biggest challenge?

One of my most significant challenges has been grasping the intricacies of portfolio management. It's essential to

strike the right balance between risk and return, and I've been honing my skills to ensure I make well-informed decisions.

What's something surprising you've learned?

One surprising thing I discovered during my internship is the crucial role of emotional intelligence in finance. Understanding and empathizing with clients' unique situations can significantly impact the success of their financial plans.

What's your go-to source for investment information?

I rely on a combination of reputable financial news websites, industry reports, and insights from our in-house research team to stay up-to-date with the latest investment trends and developments. Some of my favorites include [J.P Morgan](#), [Bloomberg](#), and market research provided by [Charles Schwab](#).

What do you like to do when you are not working?

Outside of work, I have two main passions that keep me engaged. First, I find solace and strength in



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hitting the gym and lifting weights. Staying active and striving for physical well-being has been an essential aspect of my life.

Additionally, I enjoy managing my personal investment portfolio. Diving into the world of finance not only as a profession but also on a personal level allows me to apply the information I've gained during my internship to make informed decisions about my own financial future. It's both rewarding and a continuous learning experience.

How did you land in Portland, Oregon?

I chose to stay in Portland, Oregon for my internship and education due to my strong attachment to the city. Being born and raised here, I have a deep love for Portland and its vibrant community. When the opportunity arose to pursue my internship at Arnerich Massena, it was a natural decision to remain in the city that I call home.

Additionally, Portland's reputation as a hub for finance professionals, combined with its cultural richness and beautiful natural surroundings, made it an ideal place to develop my skills in the financial industry while enjoying a fulfilling lifestyle. Staying in Portland allows me to contribute to the financial landscape of my hometown and give back to the community that has supported me throughout my life.

What are your plans once you finish school?

I currently do not have a fixed path in mind, but I am confident that my passion for finance and wealth management will guide me toward a fulfilling career. Embracing this openness, I am eager to explore various opportunities within the finance sector to find the perfect fit for my skills and interests. With the knowledge and experiences gained during my internship and education, I am optimistic about the positive impact I can make in the finance industry, and I look forward to embarking on a rewarding journey that aligns with my values and aspirations.

What inspires you?

Warren Buffett's investment philosophy has always been a great source of inspiration for me. His emphasis on long-term thinking, value investing, and continuous learning reflects the principles I aim to apply throughout my career.



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