FINANCE INTERN POSITION

FIRM OVERVIEW:

Legend Financial Advisors, Inc.® (Legend) is a Fee-Only Securities and Exchange Commission registered Investment Advisory Firm with its headquarters located in the North Hills of Pittsburgh, Pennsylvania. Legend provides Wealth Advisory Services including Financial Planning and Investment Management to affluent and wealthy individuals as well as business entities and non-profit organizations. We are proud to be selected as one of the "50 Best Places To Work In Western Pennsylvania" by the *Pittsburgh Business Times* for the past three years.

We are currently seeking college freshmen, sophomores or juniors with an interest in personal finance and investing to join our team for a Finance Internship. We will provide qualified individuals with outstanding educational and growth opportunities. If you are a high-energy individual with a strong work ethic, excellent team skills and a commitment to outstanding client service, we would like to speak with you.

The position is full-time during the summer and part-time during the academic year (we do not offer "summer only" internships). We require a minimum of 250 work hours (this averages approximately 16 to 17 hours per week) during the fall and spring school semesters, including at least 45 hours on Saturdays. During the summer, we require forty (40) work hours per week.

Additional information about our firm can be found on our Web site **www.legend-financial.com**.

Interested candidates should send their resume and completed employment application to:

Celine M. Stanasolovich
Director of Human Resources and Accounting
Legend Financial Advisors, Inc.®
5700 Corporate Drive, Suite 350
Pittsburgh, PA 15237-5829

FINANCE INTERN POSITION DESCRIPTION

NECESSARY SKILLS:

1. Microsoft Word
2. Microsoft Excel
3. Strong communication and grammar skills
4. Basic knowledge of investment concepts: Stocks, Bonds, Mutual Funds, etc.

INVESTMENT MANAGEMENT DUTIES:

1. Arrange, listen to and write reports summarizing conference calls with portfolio managers of mutual funds and/or privately managed accounts.
2. Perform research on mutual funds, stocks and other securities.
3. Assist in the development of presentations to clients and potential clients.
4. Assist with preparation and execution of securities trades. Verify the accuracy of the trades.
5. Prepare and proofread investment management performance reports and client fee calculations.
6. Prepare securities transfer paperwork. Perform follow-up on transfer process and record progress.
7. Update securities prices of individually held securities.
8. Troubleshoot client account problems.
9. Assist in the development of model portfolios, Investment Policy Statements of clients, Legend's® Risk Tolerance Questionnaire and Portfolio Manager Interview Questionnaires.
10. Maintain and update various information regarding recommended investments.
11. Participate in Investment Committee meetings.
12. Update and maintain spreadsheets for Equity Portfolios: Stock Analysis pages.

FINANCIAL PLANNING DUTIES:

1. Assist in the development of presentations to clients and potential clients.
2. Research insurance company information:
    a. Prepare client policy surveys to insurance companies.
    b. Obtain ratings information of insurance companies.
3. Troubleshoot client problems.
4. Research savings bond information.
5. Prepare loan amortization schedules.
6. Prepare cost basis calculations for securities sold during the current year.
7. Call various companies for information on behalf of clients.
8. Prepare the following financial exhibits:
    a. Balance Sheet
    b. Income Tax Projection
    c. Cash Flow Projection
    d. Life, Disability, Health, Long-Term Care Insurance Summaries
    e. Homeowners, Automobile and Umbrella Insurance Summaries
    f. Estate Planning Document Summary
9. Prepare the following projections:
    a. Retirement Projection
    b. Survivor Projection
    c. Education Projection
    d. Estate Tax Calculation

LEARN THE FOLLOWING SOFTWARE:

1. Bloomberg Professional
2. Morningstar Principia Pro for open-end mutual funds, closed-end mutual funds, and variable annuities.

3. Portfolio Center Performance Monitor
4. IRebal Across-Account Rebalancing Software
5. Various Internet-based investment applications
    a. Zacks Advisor Research
    b. Zero Coupon Bond Calculator “OID Calculator”
    c. Leutholdgroup.com
    d. Thompson Financial
    e. Morningstar.com
    f. Veo—TD Ameritrade’s advisor Web site—to review client account information.
    g. Advisor Client.com—TD Ameritrade’s software for clients to review their accounts.
    h. Various others on an as-needed basis.
6. Protracker database.
7. Docuxplorer Document Management System
8. BNA Income Tax Planner
9. Total Planning Software
    a. Golden Years (Retirement Projection)
    b. Easy Money (Estate Tax Calculation and Education Projection)
10. TValue 5 Loan Amortization Software

MISCELLANEOUS DUTIES:

1. Perform any other duties assigned by employer.