FINANCE INTERN POSITION

FIRM OVERVIEW:

Legend Financial Advisors, Inc.® (Legend) is a Non-Commission, 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 currently seeking college freshmen, sophomores, or juniors with an interest in working in a professional business environment to join our team for a Finance Internship. We will provide qualified individuals with outstanding education and growth opportunities. If you are a high-energy individual with a strong work ethic, excellent team skills and outstanding communication skills, we would like to speak with you.

We offer internships that are paid and are year-round (we do not offer "Summer Only" internships). Positions are part-time during the academic year: a minimum of 15.0 hours worked per week are required. During the Summer, our students work an expanded schedule of hours.

Additional information about our firm can be found on our Website **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 utilizing various investment research services including Bloomberg, Morningstar, Zacks, etc.
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, 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.
13. Compile daily performance of portfolios.

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 U.S. 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. First Call
    d. Ford’s Investment Research
    e. Thompson Financial
    f. Morningstar.com
    g. Veo—TD Ameritrade’s advisor Web site—to review client account information.
    h. Advisor Client.com—TD Ameritrade’s software for clients to review their accounts.
    i. 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.