

Example of a learning plan for internships

[Business](#)



Management Learning objectives for placement / Tasks to work on / Skills to develop | Sources of Support / Resources | Potential obstacles | Time-scale aimed for | Level of achievement | | Who can help? What resources do you need? | What will prevent you achieving your goals? | | Did you meet your goal fully, partially or not at all? What stopped you from fully achieving it? | Analytical work and research-based projects using Bloomberg. | Several seminars at Bloomberg in Geneva, co-workers, existing data research in form of Bloomberg templates. Potential shortness of the time frame and shift of priorities.

| 3 months. | Yes fully. | Client advisory work and investment-related projects. | Co-workers' experience and advice, existing value investing strategies and data within the company, client dossiers and compliance data. | Potential shortness of the time frame and shift of priorities. | 6 months.

| Yes fully. | Administrative work. | Co-workers' experience and advice. | Potential shortness of the time frame and shift of priorities. |

2 months. Yes fully.

| Quantitative and qualitative analysis of companies. | Co-workers' experience and advice, data and facts about the different corporations, own research using the Bloomberg tool. | Potential shortness of the time frame and shift of priorities. | ; gt; 3 months. | Yes fully.

| Meetings with Hedge Fund managers and companies. | Co-workers' experience and advice, necessary information about the hedge funds. | Potential shortness of the time frame and shift of priorities. | 6 months. | Yes fully.

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Preparation of trading investments. | Co-workers' experience and advice, clients' account and portfolio information, different tools to conduct the trading processes. | Potential shortness of the time frame and shift of priorities. | 2 months. | Yes fully. | Portfolio management.

| Co-workers' experience and advice, personal contact with clients and other relationship / portfolio managers. | Potential shortness of the time frame and shift of priorities. | ; gt; 6 months. | Yes fully. | Client meetings ; amp; presentations.

Co-workers' experience and advice, background information of the client, the intention of my direct supervisor. Presentation tools and own skills. | Potential shortness of the time frame and shift of priorities. | 3 - 4 months. | Yes fully.

| Assistance to relationship managers. | Experience, advice and orders of the relationship managers. | Potential shortness of the time frame and shift of priorities. | 2 months. | Yes fully. | Analysis of stock and bond issues.

| Co-workers' experience and advice, research tools such as Bloomberg, own knowledge and valuations. Potential shortness of the time frame and shift of priorities. | ; gt; 3 months. | Yes fully. | Identify new investment possibilities. | Co-workers' experience and advice, research tools such as Bloomberg, own knowledge and valuations.

| Potential shortness of the time frame and shift of priorities. | > 6 months. | Yes fully. | Analysis of mutual and hedge funds. | Co-workers' experience and

advice, research tools such as Bloomberg, own knowledge and valuations. |
Potential shortness of the time frame and shift of priorities.

| ; gt; 6 months. | Yes fully. |