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summaries

SIGMA INVESTMENT COUNSELORS

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THE WORK BEHIND THE RECOMMENDATION

This is the best summer of my life. Interning at Sigma has been great on its own, and it got even better with Spain winning the World Cup and the Knicks winning the NBA championship. Both of those wins took months of work nobody outside the team ever saw. I got a version of that at Sigma too, just from a completely different seat.

I split my time between two teams this summer: advisors' meetings with clients, and analytical investment research. Getting to know both sides of the business was the best part, because it showed me how much team effort goes into managing our clients' wealth, and how many layers of the firm work together for everyday decisions that clients never get to see.

Sitting in client meetings taught me something I wasn't expecting, and it had nothing to do with picking investments. Every advisor talked to their clients differently — their style, their pacing, how they connected with someone across the table. I learned that listening is a skill of its own. I also learned that each client has unique needs. Some clients wanted growth in their portfolio and didn't mind the volatility that comes with it. Others just wanted peace of mind to know that their retirement is secure. Understanding a client's personal goals and values is what helps build and maintain the relationship.

And then there's research effort that goes on behind the scenes. This includes investment due diligence, evaluating securities, executing trades and intense discussions at weekly Investment Committee meetings. This summer, I got to help the team monitor existing holdings and research and explore new asset classes. I was also able to join meetings with fund managers and ask questions related to investment process and philosophy, performance history, expenses, lessons learned, risks, and market outlooks. My main takeaway was how much effort went into the research process and the evaluation of a new investment option. This included what questions to ask, which risks get flagged, and how they built a framework when approaching something new.

Not everyone on a championship team is Jalen Brunson or OG Anunoby. The Knicks won because of everyone on the team, not just the main players who get the highlights. Sigma is the same kind of team where everyone at the firm works together to best serve our clients and help them meet their goals and investment objectives. Hopefully my classmates back on campus had a similar experience this summer during their internships and learned these same lessons about the importance of teamwork, since my teammates on group projects in the past have seemed to suffer from the same terrible wifi or sickness, especially on the day we're supposed to present.

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