Corporate Work Study Program

Long-Term Projects for Financial & Investment Firm Placements

These projects are designed to keep you engaged and productive during downtime. They can be worked on at any time, even if your supervisor is busy or you have finished your daily tasks. Each project builds skills that are valuable in the financial services industry.

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1. Daily/Weekly Market Tracker Objective: Track financial markets and improve your understanding of economic trends.

Instructions:

- Create a spreadsheet in Excel or Google Sheets.
- Add columns for:
  - Date
  - S&P 500 closing value
  - NASDAQ closing value
  - Dow Jones closing value
  - Federal Funds Interest Rate (weekly)
  - Any company stock your firm is monitoring (get approval first)
- Update daily or weekly, depending on your availability.
- Use Yahoo Finance or Google Finance to find current data.
- Optional: Write a short sentence or two about major news that might explain changes in the market.

Deliverable: A well-maintained spreadsheet with charts and trends tracked over time.

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2. Firm Mentions & News Clipping Archive Objective: Keep your team informed of public mentions and relevant news.

Instructions:

- Use Google News to search your company name and top clients (ask your supervisor for a list).
- Check for updates 2–3 times per week.
- Save links or download articles as PDFs.
- Create a simple report in a Google Doc or Slide Deck:
  - Title of article
  - Source (e.g., Bloomberg, CNBC)
  - Date
  - Short summary (2-3 sentences)

- Organize by week or topic.
  Deliverable: A running news archive and summary document to share monthly with your supervisor.

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3. Client or Industry One-Pager Research Objective: Learn more about the companies your firm works with or watches.

Instructions:

- Choose one company per week (ask your supervisor for a list or use public companies in your firm's industry).
- Research using Google, Yahoo Finance, and company websites.
- Include:
  - Company name, logo, and location
  - Industry and primary products/services
  - Recent news or performance update
  - CEO or leadership team
  - Key financials (revenue, stock price if public)
- Format into a clean one-page summary (Word or Google Docs).
  Deliverable: A binder or folder of company profiles by the end of the semester.

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4. CRM Data Clean-Up Objective: Improve the accuracy and usability of contact databases.

Instructions:

- Ask your supervisor for access to the CRM or Excel file of contacts.
- Review contacts to check for:
  - Consistent formatting (phone numbers, capitalization)
  - Duplicates
  - Missing fields (try to find missing info via LinkedIn or firm websites)
- Make careful, clean edits only as directed.
- Keep a changelog if required.
  Deliverable: A cleaner, more reliable CRM or contact sheet.

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5. Investment Fund or Stock Profile Binder Objective: Build understanding of how various investments work.

Instructions:

- Select a mutual fund, ETF, or stock each week (ask your supervisor for suggestions).
- Create a one-page fact sheet with:
  - Fund/stock name and ticker
  - Industry sector
  - Risk rating (Morningstar or similar)
  - 1-year, 5-year performance
  - Management team
- Use Morningstar, Yahoo Finance, and fund websites for data.

Deliverable: A portfolio of investment profiles for internal reference or future students.

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6. Internal Resource Wiki / "How-To" Manual Objective: Document how to navigate your workplace and complete basic tasks.

Instructions:

- Create a Google Doc or Slide Deck to document:
  - How to log into company systems
  - How to scan, copy, file documents
  - Where to find supplies or office contacts
  - Email or phone protocols
- Include screenshots or photos when possible.
- Think about what you wish you knew on your first day!

Deliverable: A handbook that can be used to train future interns.

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7. Google Sheets Certification Project Objective: Earn a professional credential in spreadsheet skills.

Instructions:

- Go to https://www.coursera.org and search for "Google Sheets for Beginners" or visit https://grow.google/certificates
- Choose a course that leads to a Google Sheets or Google Workspace Certification.
- Dedicate time each week to learning functions like:
  - VLOOKUP, SUMIF, IF statements
  - Data validation
  - Charts and graphs
- Practice using firm-approved or dummy data.
- When ready, register for the certification exam (some are free, others cost money – check with CWSP team first).

Deliverable: A digital certificate of completion and improved Sheets skills that can be used daily on the job.

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8. Firm History or Timeline Project Objective: Learn the story of your company and present it visually.

Instructions:

- Research the founding, growth, and milestones of your firm.
- Use the company website, LinkedIn, or Google searches.
- Create a timeline using Google Slides, PowerPoint, or Canva.
- Include:
  - Founding year
  - Major mergers/acquisitions
  - Key leadership changes
  - Awards or recognitions
- Ask if you can present this to a team member.