

00;00;02;08 - 00;00;27;15

Alicia

Welcome to this episode of The Side of the Desk. I'm your host for today. Alisha Edwards and I work in our deployment capacity across personal investing distribution. On the episode, we have three guests joining us, part of our intern program, our guest interns who are part of our 1140 interns across all of our business units nationally. Joining us for a ten week program to work with Fidelity Associates.

00;00;27;19 - 00;00;29;11

Alicia

Thank you guys, so much for joining us today.

00;00;29;13 - 00;00;30;14

Jacque

Yeah, thanks for having us.

00;00;30;16 - 00;00;31;09

Raemi

For sure.

00;00;31;14 - 00;00;43;14

Alicia

So today, I think we'd start by interviewing each of you and we can just kind of go in in this order around the circle. Raemi if you want to give us your your quick background, where you go to school, what you're you are, what your major is.

00;00;43;17 - 00;00;44;23

Alicia

Just a quick background.

00;00;45;01 - 00;01;04;14

Raemi

Sure. So I am majoring in political science and economics at the University of Vermont. I'm a rising third year, originally from D.C. and I'm loving my experience. Awesome. I'm also interning with my agent for it, which is a software that helps our workplace investing associates help their clients. Very exciting project.

00;01;04;19 - 00;01;05;21

Alicia

That's awesome. That's what we do.

00;01;05;21 - 00;01;07;25

Alicia

We help people. So that sounds good. Dante

00;01;07;28 - 00;01;20;04

Dante

How's it going, guys? I,Ãm a rising Senior at Providence College. Go. Friars majoring in accounting and finance. And a little fun fact about me. I have five younger sisters, and, yeah, I'm interning at the Providence branch this summer.

00;01;20;13 - 00;01;20;26

Alicia

Oh, my gosh.

00;01;20;27 - 00;01;21;24

Dante

Excited to be a Fidtern

00;01;21;27 - 00;01;23;22

Alicia

That is awesome. I can't believe that.

00;01;23;22 - 00;01;28;13

Alicia

I feel like all of our jaws just dropped in person. Five younger sisters.

00;01;28;13 - 00;01;29;05

Dante

Quite a handful.

00;01;29;07 - 00;01;30;18

Alicia

That's awesome. Jackie.

00;01;30;18 - 00;01;46;17

Jacque

Yeah. Hey, guys. I'm Jackie Harrington. Ironically, I am also a rising senior at Providence College. Go, Friars. I play softball there, and I'm studying finance. And this summer for Fidelity, I'm in national sales. More specifically in the Fili department.

00;01;46;23 - 00;01;52;11

Jacque

More specifically, long term care. I'm in Boston this summer. Just really having a blast so far.

00;01;52;19 - 00;02;05;27

Alicia

That's awesome. Well, thank you so much again for joining us. We're excited to hear your perspectives on what your journey has been like so far. So I know I already mentioned that we have a ten week program and you guys are, what, four weeks and already.

00;02;05;27 - 00;02;19;22

Alicia

Yeah, I think so. Summer's flying by. Yeah, it's crazy. That's wild. That's awesome. Well, to start off, and this can be for anyone. What drew you to Fidelity? Why? Why fidelity? Why did you pick this as where you were going to do your internship?

00;02;20;01 - 00;02;32;25

Dante

So I guess I could start. So my uncle worked at Fidelity, and, you know, everything I heard from him and from friends who knew people who worked at Fidelity, it was just always positive things like I never heard a single like negative comment about the company.

00;02;32;25 - 00;02;51;04

Dante

It just seemed like an awesome place to work. So, you know, as a finance manager, I definitely wanted to get involved in the finance industry and see what I liked and what I didn't. And, you know, with all the good comments surrounding it, it just drew me in and I had to apply, you know, to see if what everybody else was saying was true.

00;02;51;06 - 00;03;11;14

Jacque

Yeah. I also had, I feel like a similar experience. My friends that interned last year as fiduciary means and they just had a blast. They learned so much and just hearing about how much it helps you develop and how much they encourage you to find an area that you're really passionate about is something that drew me in, especially going into my senior year.

00;03;11;14 - 00;03;21;27

Jacque

I really wanted to be within the financial services industry and again, similar to Dante, only good things I've heard about Fidelity, so I wanted to try it out for myself and see.

00;03;22;16 - 00;03;39;21

Raemi

So I actually have been investing with fidelity since I was 14. I was always really interested in investing and loved every interaction I had over the phone and even over the phone as a 1415 year old setting up my account, I could tell that the culture was really special.

00;03;39;21 - 00;04;05;04

Raemi

Everybody always answered really fast and they seemed super happy to be there. And that was something I, I really wanted to be a bigger part of. So I got involved with Fidelity as a first year, finishing up what counted as my sophomore year because of credits, and I knew nobody that worked here. So I messaged school alumni over LinkedIn, totally cold messaged him.

00;04;05;04 - 00;04;21;29

Raemi

He's from Vermont, I'm from Maryland, didn't know him at all, and asked if they had any opportunities in sustainability or sustainable investing. And I've never taken a class in either. And he welcomed me with warm arms and the rest is history. Second year interning and every minute has been a blast.

00;04;22;09 - 00;04;32;28

Alicia

That's awesome. I feel so happy to have you guys here and hear those perspectives because a lot of that rings true for me and other things that we have shared on these episodes in the past.

00;04;33;08 - 00;05;02;05

Alicia

So for me, very similar to Dante and Jackie, I was also drawn to fidelity through people that I knew. I've actually had four separate cousins work at Fidelity at a different point in their lives. They took a, you know, different step in their career to work in different industries now. But when I was graduating from school, I was thinking about working at Fidelity and although none of my cousins still work here, all of them overwhelmingly were like, You have to work at Fidelity.

00;05;02;05 - 00;05;22;16

Alicia

And I was like, Oh my God, they don't even work here anymore. Like, it must be great. And then what you were sharing about, like you called message somebody. Raemi and they gave you their time and they were warm and they were open. And I genuinely find that to be a universal experience at Fidelity. Anyone in this company will give you 20 minutes of their time, talk to you about what they do.

00;05;22;18 - 00;05;31;03

Alicia

Be excited to hear about what you do, answer any questions you have. And I think that's really special. So it's definitely one of my favorite parts about working at Fidelity now.

00;05;31;06 - 00;05;41;27

Jacque

Yeah, you don't see that many other places and I feel like it's something that's always been so pushed. Everyone's talking about how welcoming everyone is, like with all the associates.

00;05;41;27 - 00;05;49;06

Jacque

And until I actually stepped foot here, had my first few weeks, like I got to see it firsthand just to show how true it was, which is just crazy.

00;05;49;12 - 00;05;59;12

Dante

Yeah, I could totally agree with that and add to it as well. My first day I was pretty nervous, to be honest, and I came in and everyone was just, you know, big smiles on their face, like welcoming, welcoming me in.

00;05;59;25 - 00;06;07;28

Dante

And, you know, it just really made me get comfortable real fast, you know, everybody just loves being there and loves working at Fidelity and, you know, it's awesome environment.

00;06;08;10 - 00;06;14;04

Alicia

That's so great to hear. What has surprised you in the last four weeks about working at Fidelity?

00;06;14;14 - 00;06;21;29

Raemi

I would say how much you continually learn. I thought as a second year intern it would be repetitive in some ways and it has been.

00;06;22;26 - 00;06;46;08

Raemi

But those those ways that it's been slightly repetitive has just kind of made me nostalgic about having my first internship with Fidelity last year and just like the endless amount of learning you can do here, it's such an enormous company and in one internship to three in a full career, you can't reach everybody who works here and understand every part of the company.

00;06;46;11 - 00;06;57;13

Raemi

And I think that motivates me even more to get to know as much as I can while I'm here. And I would say just the endless amount of learning you can do here while contributing to the greater company goals.

00;06;57;23 - 00;07;11;21

Jacque

I was really surprised by just all the different fields that you can go into and if you have one specific interest, they 99% of the time have someone that you can talk to within that industry.

00;07;11;21 - 00;07;33;22

Jacque

Like, for example, my project for this summer involves podcasting, which is something that I've never done before, but it's something I've always been interested in and you know, you would think Fidelity, it's a financial services company. You can't really do much on the creative media side. But when I got here, I found out they have a whole department that's dedicated to that, which has been really cool.

00;07;33;22 - 00;07;40;12

Jacque

So I've been really able to kind of broad in my horizons and really find what I'm passionate about, which is really, really been awesome.

00;07;40;16 - 00;07;53;03

Alicia

Which is cool too, because it's something that you wouldn't expect from a financial finance company somewhere in the financial services. And to have each of you have very different projects this summer and, and different areas of learning and experiences.

00;07;53;03 - 00;08;09;23

Alicia

So that's one of the other really cool things that we've echoed in previous episodes. So it's really great to hear that you guys are having the same kind of experience in just four short weeks that we've been talking about on the podcast of just being able to explore all kinds of different paths, develop different types of skills, and especially so quickly

00;08;10;09 - 00;08;16;08

Dante

if I were to add something, got off of Jackie's point Fidelity really does have a broad array of stuff you could do.

00;08;16;15 - 00;08;30;18

Dante

So if someone's working in like a branch or something, but say they want to go over to asset management, Fidelity gives you the opportunity to do that if you're qualified. Whereas at other firms, you know, like my coworker put it, he said, they kind of laugh at you if you want to jump into another position and you're already stuck in one.

00;08;30;18 - 00;08;37;06

Dante

So it's, you know, that to me is really awesome and it's really made me really appreciate the kind of company that Fidelity is.

00;08;37;14 - 00;08;55;26

Raemi

Yeah. Just to add on to exploring the different company business units, as we call them, and getting projects in different ones. I personally last year I was a sales intern for ESG Pro, which is a startup offering software as a service to financial advisors.

00;08;56;08 - 00;09;16;15

Raemi

And during that internship I got onboarded to two projects which I was super excited to do with our real estate sustainability team, which was an amazing opportunity as a business analyst this summer. I'm still doing sustainability projects with that real estate team and these are completely different sides of the company.

00;09;16;26 - 00;09;21;00

Alicia

That's really awesome and really interesting that you've chosen to come back for a second summer.

00;09;21;00 - 00;09;26;01

Alicia

So what was something that drew you to come back instead of try to get a different experience somewhere else?

00;09;26;15 - 00;09;43;14

Raemi

I would say just how welcoming Fidelity is. I feel at home here and I see people that have spent their whole career here and there are so many programs and ways that Fidelity invests in you from benefits after you graduate to programing while you're interning.

00;09;43;26 - 00;10;17;16

Raemi

And I feel continuously motivated to keep contributing by managers, by team members, and by intern peers across the company. That just make me, I guess, want to stay here and enjoy, enjoy my experience here. And also, fidelity is so strong with sustainability. There are solar panels at many of our campuses. There are organic farms at some of our campuses, and fidelity is so authentically sustainable that I'm really excited to hopefully contribute more to that over time.

00;10;17;18 - 00;10;36;09

Alicia

Yeah, that's exciting that you get to express a passion that is, you know, not not in a very direct way correlated to financial services, but to find it over the course of not one but two summers where you'll be able to contribute to very different projects and flex different muscles, develop different skills, get in different networks, that's really, really awesome.

00;10;36;16 - 00;10;49;20

Alicia

Switching gears a little bit, what has been a challenge that you guys have run into that maybe either you weren't expecting or you had to work with a partner to resolve or consult with a manager. Tell me about some of those experiences you've had so far.

00;10;49;21 - 00;10;57;09

Jacque

I guess for me, navigating and figuring out what my project was going to be was probably the biggest challenge.

00;10;57;09 - 00;11;29;04

Jacque

Just because the department I'm in is so niche and it was the first intern that my manager has ever had. So it was a lot of troubleshooting for us both and we had to do a lot of talking and debriefing and really finding a project for me that's going to align with something I'm interested in which another thing that has just been awesome, like I want to shout out my manager, Tina, she's been done a great job of not giving me like the stereotypical, like intern busywork, like, go get coffee.

00;11;29;04 - 00;11;52;13

Jacque

Well, she's in Utah, so I can't get her coffee even if she wanted it. But she's been really good about catering, like the assignments to something that is interesting to me so that I'll be able to get the most out of this internship, which I've never seen at any other company. I've been at. So at the beginning I would say it was a struggle figuring out what I was going to be doing for the summer.

00;11;52;13 - 00;12;02;01

Jacque

But once we did a little bit of brainstorming, troubleshooting, then we were kind of able to narrow it down and then land on the podcast solution for it, which has been awesome.

00;12;02;03 - 00;12;14;29

Dante

Yeah. So a challenge that I went through was the whole onboarding process because there's like, so you're working as an intern, you have you had to learn about fidelity, learn about our systems, our policies, all that at the same time, get accustomed to your role at the branch.

00;12;15;20 - 00;12;35;28

Dante

So working with the FRS, which just stands for financial representatives, there's a lot of stuff that you have to learn and a lot of systems that you got to get accustomed to while at the same time learning all that onboarding stuff. So initially it was tough to get accustomed to all that. But I will say finishing up week 4 a.m. pretty much into the swing of things, but it was initially difficult.

00;12;36;01 - 00;12;40;07

Dante

You know, I put it as like it was kind of drinking from a firehose. That's how difficult it was.

00;12;40;07 - 00;12;41;03

Alicia

That sounds correct.

00;12;41;12 - 00;12;58;26

Raemi

I would say my greatest challenge so far has been managing my connections. Fidelity really encourages networking, especially for interns, since we're already here for ten weeks and we have the opportunity to ping, as we say, which is a message on teams or email.

00;12;58;26 - 00;13;36;12

Raemi

Anyone in a company with tens of thousands of employees and learning about what each employee does is a really cool opportunity. However, sometimes managing those connections can be a little much. Nobody can be best friends with everybody. And so I would say it's been a little challenging to realize who would I imagine myself reaching out to in the future and who works in business units and on teams that I plan to stay in touch with over the next year as I'm graduating in May.

00;13;36;14 - 00;13;40;08

Raemi

So yeah, definitely, definitely networking strategically,

00;13;40;11 - 00;14;03;10

Alicia

that's a great one. Yeah, I feel like fidelity is so interesting. It's either, Oh, I know someone who works at Fidelity, you've never heard of them or they work on your team. Like there's really no in



between. Like Jackie and I figured out we have a mutual connection. Do a mutual connection. So that's just an example of how intimate fidelity can be while still being such a large company, but presenting all those different networking opportunities, which is really cool.

00;14;03;11 - 00;14;26;13

Jacque

Yeah, it's funny. I was actually talking about like my internship too, like a couple, like just random people. I don't even remember who was, but they were like asking me specific questions like, Oh, I know someone that works at Fidelity. Do you know this person? I'm like, No, there's like 80,000 people in the company. I'm not going to know this one random person, but it just goes to show I feel like everyone that you talk to knows someone in some regard that works at this company.

00;14;26;18 - 00;14;49;07

Alicia

Absolutely. So transitioning, I know where you've just kind of begun in your internship. You're in that first quarter or third of of it, so to speak, quickly approaching the half, I think. But what's something that you've been able to develop either personally or professionally over the course of the last couple of weeks that you feel like is a key takeaway that you can either bring back to your classes or apply in your future career.

00;14;49;14 - 00;15;09;08

Jacque

I think relationship building for me was my biggest one. I like to think like looking back to when I first started college, it was fresh out of COVID mist, my senior year of high school and my freshman year of college. I just really forgot how to interact with people. And when I went back to school, I just never felt like I was the same person socially that I was.

00;15;09;10 - 00;15;33;17

Jacque

But being here and being in Boston where there's 300 interns that don't really know each other that well, going into it, you're kind of like forced to really just reach out of your comfort zone and connect with people and everyone is in the same boat and very social. So, you know, you just ask one person how their day is going and then, you know, it turns out that, oh, you have a lot more in common than you think.

00;15;33;17 - 00;15;39;16

Jacque

So that's been that's been something that's really big for me that I'm excited to kind of bring back into when I go back to school.

00;15;40;10 - 00;15;50;16

Dante

Yeah. So something I picked up, especially working at an investor center, is interpersonal skills. I mean, you're going to be working with clients every day no matter what role you're in and doing this day in and day out.

00;15;50;16 - 00;16;09;18

Dante

It's really, you know, given me an insight into what clients are looking for and how to really give them the best interaction possible. I mean, at Fidelity, we are a customer obsessed company and you really do learn how to interact with clients, which is extremely important in any role you work in, in any field. I mean, you're going to need to know how to talk to people, and that's crucial.

00;16;09;18 - 00;16;17;21

Dante

And I will say, being in this role, I have learned a lot in terms of communication skills and how to better serve customers.

00;16;17;28 - 00;16;38;19

Raemi

I would say project management, fidelity, really trusts its interns with important projects that can be presented to senior leadership in all departments and to be 18, 19, 20 being part of these projects and leading them and organizing them and presenting them at sometimes can be daunting.

00;16;38;19 - 00;16;56;16

Raemi

And it's something that I've definitely gained confidence with over the past half summer and last summer, and definitely something I plan on adding to my skill set and practicing more as as I continue on to future career moves.

00;16;56;27 - 00;17;07;11

Alicia

That's awesome. I think those are all three really good takeaways. So I'm happy that you guys have been able to have that experience so quickly and that you'll continue to build on your skill sets throughout the rest of the summer.

00;17;07;22 - 00;17;21;00

Alicia

So in wrapping up now, if you guys were to offer a piece of advice to our prospective interns, what is one piece of advice that you could share from your experience so far to anybody who is considering interning at Fidelity?

00;17;21;07 - 00;17;38;23

Jacque

Stay curious. I think if you have one small thing that you're interested in, there's going to be people that you can talk to so don't necessarily put yourself in a rabbit hole of what you think you should do based on it being like a big financial services company.

00;17;39;00 - 00;17;53;26

Jacque

Like if you're if you think that you might want to do more marketing or analytics or if you have any interest in like other departments, like as an intern, reach out to people, pick their brains, figure out where you might want to go, come post-grad.

00;17;54;00 - 00;18;01;03

Dante

yeah related to your point. I think of your prospective intern at fidelity. I think you should really do everything you can to get the most out of your internship.

00;18;01;03 - 00;18;21;14

Dante

I mean, really what you put in is what you're going to get out. You're gonna be working with some great people who definitely have insights and things you could learn from. And I'd say really just build connections with everybody you work with and try to learn as much as possible. Like me personally, I try to get in as many shadowing meetings as I can with advisors just to pick up on, you know, how they serve clients.

00;18;21;17 - 00;18;26;29

Dante

You know, anything I could pick up in terms of that. So yeah, really just do everything you can to get the most out of it.

00;18;27;00 - 00;18;38;21

Raemi

I would say find your team, find the people that are going to advocate for you. Post on your LinkedIn serve as professional references. This can be in your immediate team that you work with day to day.

00;18;38;21 - 00;19;10;24

Raemi

That can also be people that you talk with maybe five times a summer. This can be someone from our wonderful employee resource groups and employee interest groups. So I have joined a sustainability focused one called Impact, and I definitely would trust each member of leadership that I've worked with. With serving as a professional reference. I also would trust people from my department that I didn't necessarily work with one on one last year to serve as my professional reference.

00;19;10;27 - 00;19;24;19

Raemi

And these are people that really will go to bat for you and will always be on your side. And they can also mentor you in really strong ways that I already have utilized in a bunch of different scenarios.

00;19;25;02 - 00;19;37;24

Alicia

That's awesome. I think those are all great pieces of advice for our prospective interns for next year. So I think my piece of advice, not that anyone asked, I was actually just I was never an intern here.

00;19;38;03 - 00;20;06;28

Alicia

I applied after college, so not quite the same, but still a very similar age group. I my piece of advice to any prospective interns would be just start looking now and visit our website Fidelity Jobs dot com and look at the opportunities and don't limit yourself fidelity like we've talked about here. Yeah we're a financial services company, but you can find pretty much anything that aligns with what you're interested in here that doesn't have to do with finance.

00;20;06;28 - 00;20;16;28

Alicia

So don't feel pigeonholed. Go for it. Pick a company because of its awesome culture, not because you think it has a finance job or doesn't. So

00;20;16;28 - 00;20;18;16

Jacque

We have a cool mascot too.

00;20;18;19 - 00;20;33;01

Alicia

The Fidelity frog. Absolutely. And I feel like some sometimes people pick colleges based on mascot, so maybe don't pick a company based on a mascot. But it's been so great having you all here and hear your perspectives over the last couple of weeks of your internship.

00;20;33;03 - 00;20;46;12

Alicia

And we're really grateful that you were able to come on and share your experiences. Thank you each for coming on today and thank you to our listeners and always to our Creative Solutions team who helps us out and makes this episode possible.

00;20;46;18 - 00;20;48;25

Jacque

Yeah, thank you for having us. It was awesome to be a part of.

00;20;48;26 - 00;20;49;21

Dante

Thank you so much.

00;20;49;21 - 00;20;50;22

Dante

It's an awesome opportunity.

00;20;50;22 - 00;20;53;27

Raemi

I loved meeting you guys and hope to stay in contact.