Ep. 212 | Clients Are Not Their Money: What Our 2026 Interns Learned This Summer

The Patti Brennan Show
Guest Host: Paige Hill, Leader of Growth and Client Engagement

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Editorial note: This transcript has been edited for clarity and readability by AI. Filler words and repetitions have been removed while preserving the original wording and voices of all speakers.

Paige: Hello, welcome to the Patti Brennan Show. Whether you have $20 or $20 million, this show is for those of you who want to grow, protect, and use your assets to live your very best lives. My name is Paige Hill. I am the Leader of Growth and Client Engagement here at Key Financial, and I will be your host of the Patti Brennan Show today.

Today we're doing things a little bit differently. We are going to turn the mic over to the next generation, where we'll introduce our interns who joined us for the 2026 summer internship at Key Financial. All right, so let's jump right in.

Grace Lane | George Washington University

Paige: We are starting with Grace here, who is back for her second internship with Key Financial. So let's just start by telling everybody your name, your major, where you go to school, and then we'll get right into it.

Grace: So I'm Grace Lane. I go to George Washington University. I'm a senior there this upcoming year. I study business with a concentration in international business and a minor in sustainability.

Paige: Awesome! That is so great. How are you liking it there?

Grace: I love it. I mean, DC is such a vibrant city, with so much to learn and so much to do. GW is such a great school. I really love it there, and we're so integrated into that social and political scene. So it's very interesting. I've learned a lot.

Paige: And why financial planning and wealth management? What piqued your interest about this internship and Key Financial specifically?

Grace: I grew up in a three generational household. My grandparents moved in with us when I was about five or six, and I got to learn from a young age how my parents had to sacrifice and save for both me and my grandparents. That kind of instilled in me that financial responsibility, as well as helping people, and I think that's something I strive to do in my career for others.

Paige: Yeah, absolutely, and it's something we do every day here, which I know we'll chat more about, how we've helped people and everything that you've done this summer and the exposure you've had, which has been really cool. So, what did a typical day look like for you this summer at Key Financial, and also a little bit like what was different from last summer as your internship too?

Grace: This summer, I mean, I've been joined by three other interns. Last summer, I was an only child here, which I'm used to being an only child. So it's been interesting having help with everything. But a typical day usually starts with me coming in. I restock the fridges and the printers and the conference rooms, and then I'll usually go to my computer, check Teams, check my email, see what I need to do for the day. Usually, I'm working on some kind of project in Excel in our CRM system where I'm updating client data, or I'm doing something with the lovely Paige in marketing in either Canva or HubSpot, and that's the typical day. Sometimes we do a fun field trip to the bank or to pick up a team lunch, and that's always fun.

But different than last summer, I'd say it's just the environment. Now I'm kind of with the other interns. We have our own little corner office, and it's fun, and I get to talk to them about what I'm working on. Whereas before, it was like I would obviously talk to you about what we were working on, or whoever else. But to get to interact with them on a more equal level, I guess.

Paige: And you have that camaraderie, which is nice, right? On a team, to just chat through different ideas and bounce things off of. So totally good. And what projects and tasks and different things did you work on this summer that you would say you're most proud of and you're excited to go back to school knowing that you did this?

Grace: Yeah, I think honestly, a lot of the projects I've worked with you on have been the ones that I'm most proud of. So like the SEO optimization project in HubSpot, that was a big one. Because you hear SEO in your marketing classes, and it's like, okay, but when you put it into practice and see how it manifests into a tangible result, that was a big learning moment for me. Also just making the Meet the Key Team booklet and different LinkedIn carousels I've helped contribute to. I think because I'm such a visual person, I can see them all the time and know that I contributed to them. I hold a lot of pride with those projects.

Paige: Yeah, definitely. And we're so grateful that you were participating in these projects. You added such a different advantage and edge, especially having just learned about things like SEO and now the evolution of it with AEO and everything that we're optimizing for our sites and our different landing pages and campaigns and things like that. So it's been great having you part of those projects.

Grace: Oh well, I appreciate being a part of the projects.

Paige: What surprised you about how a wealth management firm like Key Financial operates?

Grace: What surprised me most is the emphasis on people are not their money, and that it's people first. I think maybe that's unique to us, but when I came into this job at a financial advising firm, I think I assumed that it was going to be a lot of numbers and formulas and acronyms and dollar signs, and it's really so much more meaningful than that. I've seen how we really build that trust with our clients, and that's something I find to be really heartwarming and beautiful.

Paige: I completely agree with that, and it's something that I recognize too. I've been here a year and a half, so I'm fairly new compared to the squad here at Key Financial as well, and that's definitely something that resonated with me very quickly. It's just how much everybody cares, and the extra, not three steps but 15 steps that everybody takes to really take care of their clients. What would you say you have learned here that you could not have learned in a classroom at GW?

Grace: One thing I really learned recently is, I've been in a lot of finance classes, and 90% of it is these formulas and the math of it all, right? And then only 10% of it is them explaining the rationale behind all of that. And coming here, I recently got to talk to Spencer, who's on our investment team, and I really realized that in practice, it is 90% the rationale and concepts behind it all, and only 10% of it is really the nitty gritty math.

Paige: Yeah, right. The formulas and how you got there. Good, that's awesome. Shifting gears a little bit around lessons, what would you say is one of the most important things that you learned this summer, whether it's about financial planning or wealth management or just being in the workspace?

Grace: I realized that financial planning is really unique to each person. There's no formula that's going to work for everyone, and I've really gotten to see in the meetings the way Key does a great job at weighing all the different possibilities based off of people's needs and goals, and truly trying to find the best option for them, but giving them autonomy throughout that process.

Paige: Absolutely, it's super personal. It is white glove, but really just going the extra step to weigh the pros, the cons, run the stress tests, and really see what is best for them. So absolutely. And how did your understanding of what financial advisors do change over the course of either this summer or last summer? Because you're a veteran here.

Grace: Especially last summer. I think this summer I kind of came in already knowing this, but last summer it really solidified in me. I think I always assumed that financial advisors, their main goal is to make people rich, and I think it's so much more meaningful than that. I've really seen how we kind of hold people's hand through the tough times in life and really sit with them through those challenging obstacles, and really care about them and build that trust. And I found that to be just the most interesting part of the job, is the relationship building.

Paige: Absolutely, and really being there for them and being their rock and holding their hand through the really exciting things like weddings and celebrations and graduations, but also the really hard things like death, divorce, selling your childhood home, things like that that are really tough. So yeah, I couldn't agree more. Is there a meeting or a conversation or something that you experienced this summer that really stuck with you?

Grace: I remember hearing about how when one of our clients passed away, they left their pet bird to their designated Key Client Services member. And that really solidified in me that it's more than just being an advisor, or someone who works at their financial advising office. It's truly like a friendship and a relationship.

Paige: It is. It really is. It's a true, deep, meaningful relationship. Shout out to Bert the Bird, and Amanda, who's still taking care of Bert the Bird, and he's doing great. So, what do you know now that you wish you knew on your first day of your internship?

Grace: I expected it to be challenging work. I expected to learn a lot, but I did not expect to have so much fun here. We really are such a family here, and I feel like I've really grown great relationships with everyone here. And we do have a lot of fun, and there's a great humor that exists in this office. So it's not like I'm dreading going into work every day or anything like that. I genuinely enjoy being here.

Paige: So do I. And you can tell everybody does. It's mutual for sure. All right, so looking ahead, where do you see yourself in five years?

Grace: That's a tough question. I mean, as you know, I'm a marketing girl, and I could definitely see myself continuing in that line of work. Hopefully I'll also be working on getting a master's degree. But yeah, maybe marketing. We'll see.

Paige: We would love that, of course. The whole marketing community. Has this summer changed or shaped the direction that you want to go professionally?

Grace: It's definitely opened my eyes to the way that wealth management can be very philanthropic. I care a lot about helping people in whatever line of work I do. So it's definitely opened up that as a possibility for me. I don't know if I'd be great on an investment team, but I think maybe something like what the KCS members or the planning team does. I find that to be something I could do.

Paige: Yeah, and absolutely rewarding.

Grace: So rewarding.

Paige: And how you're helping around the clock, truly helping our clients with different life scenarios and experiences that they have.

Grace: For sure.

Paige: What would you say to a student who is considering doing an internship or launching their career in financial planning?

Grace: I would say that knowing the concepts and the formulas behind all of it is amazing and super important, but I think having that innate empathy is kind of the most important thing, in my opinion at least, because these are real people that you're dealing with, and they deserve that care and consideration when you're taking their money and trying to grow their wealth, and also helping them through life's challenges, as we talked about before.

Paige: Yes, absolutely, and this is their livelihood. They've worked decades for this. So great. Well, Grace, thank you so much for joining us this summer again for your internship, and thank you for joining us on the podcast.

Grace: Thank you so much. You know I'm always happy to be here.

Roman Malacinski | University of Delaware

Paige: All right, Roman, thank you so much for joining us on the Patti Brennan Show. So this is Roman's summer internship with us. I want to hand it over to you to introduce yourself, your name, where you're studying, and what you're studying.

Roman: Yeah, hi, I'm Roman Malacinski. I'm going to be a senior at the University of Delaware, and I'm studying finance.

Paige: Awesome. And what attracted you to finance and to financial planning and wealth management?

Roman: I think what attracted me was not only my interest in numbers and the technicals of finance, but also helping people, and I think wealth management and financial planning is a really creative crossover between the two. And helping people, guiding them through their finances, is something I think I'd be good at.

Paige: Awesome. And so this summer, walk us through what a typical day looked like for you for your internship.

Roman: Yeah, so a typical day for me would be coming in the morning, scrolling through Microsoft Teams or Redtail, finding any activities or messages I have to do, and then starting on Excel on a project that I'll be working on. If I'm not doing that, I'd probably be helping a KCS member with their filing, and on top of that, stocking the printers with paper and the refrigerators.

Paige: Keeping everything well stocked in here. Awesome, very cool. What projects or tasks did you work on that you would say you're most proud of and excited to bring back to school?

Roman: What I'm most proud of is definitely the trust project I did. Mainly did that with Shawn, but the whole team helped out for sure. What we did was we went through over 200 clients' trusts and we picked out certain information like beneficiaries, trustees, the date that was signed. We put all that in an Excel file, and that's going to help the future Key Financial members.

Paige: Yeah, that was a really important data cleanup. So definitely. What surprised you about how a wealth management firm like Key Financial operates?

Roman: What surprised me was just how much detail Key Financial keeps on its clients, whether it be what vacations they're planning, their pets' names, their children's names, everything in between. And Key Financial does that to keep tabs on all of the client relationships that they've built.

Paige: Yeah, absolutely, and it really helps us capture everything about that person to really know them and to really personalize our experience and our white glove approach that we have with them, for sure. So, what would you say is something that you learned here that you wouldn't typically learn in the classroom?

Roman: Definitely how Key Financial conducts its meetings with clients, and all the differences between how initial meetings are done, portfolio reviews, the plan. All that is something that definitely needs to be experienced rather than learned in the classroom.

Paige: Yeah, for sure. Shifting gears a little bit to big lessons. What is the most important thing that you learned this summer?

Roman: The most important thing that I learned definitely was how important client relationships are. It's not just about crunching numbers and building portfolios that are going to get the best returns, but it's also how Key Financial's relationships with their clients are, making sure they trust them and that they feel comfortable.

Paige: Yeah, it's the most important thing. How did your understanding of what a financial advisor does change over the course of the summer, or from starting the internship till where you are now?

Roman: Financial advisors definitely don't just work on numbers all day or spreadsheets. They're definitely learning a lot about their clients and keeping tabs on all their relationships.

Paige: On that note, is there a certain meeting or a conversation that you were part of or experienced that really stuck with you?

Roman: There was a story that Lori told us about how, I think it was at one of her old jobs, that she would treat all of her clients like they had the same amount of money. So whether they needed $1,000 out of an account or $100,000, she would treat it with the same urgency. And that's something that stuck with me.

Paige: Definitely. Shout out to Lori, because I've heard her say that before, and it is a really important lesson. What do you know now that you wish you knew on your first day of the internship?

Roman: Definitely that everyone here is trying to help, so don't be scared to ask questions. Everyone's super nice.

Paige: Yeah, and carry that through your whole career, 20, 30, 40 years in. It remains one of the most important things for sure. It's just digging in and asking questions. So looking ahead, where do you see yourself in five years?

Roman: In five years, I definitely see myself working in a wealth management firm, probably trying to get my certifications like a CFA or CFP.

Paige: Awesome, love it. That's great. How has this summer changed or shaped the direction that you want to go professionally?

Roman: This summer made me realize that wealth management is a lot of client-facing roles, and that's something I want to keep exploring and try and get better at.

Paige: Great, and you enjoy the client interaction. You did a great job with that all summer.

Roman: Thank you.

Paige: You definitely should pursue that more. What advice would you give to a student who is also interested in financial planning or wealth management, and either wants to start an internship at a firm like Key or launch their career in financial planning?

Roman: Yeah, the advice I would give to them is figure out why they want a career in wealth management. There's a lot of different roles you can do, whether it's client facing or the technicals. And if you get an internship in wealth management, kind of keep an open mind, try everything out and see what you like.

Paige: Yeah, and that was the beauty of the internship, right? You tried a lot of different things and had exposure to a lot of different departments and everything. So, thank you for joining us on the Patti Brennan Show. Thank you for joining us for your internship this summer. It was awesome having you on the team. You were such an asset to everybody. So thank you, Roman.

Roman: Thank you.

Shawn Zebrowski | Catholic University

Paige: All right, and now we have Shawn joining us. So, Shawn, please tell us your name, your full name, what you're studying, where you're studying. And this is your first year interning at Key Financial, right? Awesome. So tell us a little about yourself.

Shawn: I'm Shawn Zebrowski. I'm a rising junior at Catholic University in Washington, D.C. I'm majoring in business administration with specializations in marketing and sales.

Paige: Awesome, love that. What made you interested in financial planning and wealth management, and really drew you into the internship here at Key Financial?

Shawn: So I believe that financial planning and wealth management is such a useful tool to have in the business world. I believe having these skills can go a long way. And I really wanted to see how a business actually works and how a wealth management firm fully helps people, not just financially but personally as well.

Paige: Yeah, absolutely. Walk us through what a typical day looked like for you this summer during your internship.

Shawn: So the first thing I would always do is log into my computer and check Teams and Redtail to see what was on the agenda for today, and then I would continue any ongoing project, whether that be with Excel, Redtail, etc. And then I would help with either scanning documents, filing, any housekeeping items. And then I would do research on clients that are coming in for meetings, and sit in on those meetings, take as many notes as possible. And at the end of every day, I have an ongoing journal document where I write down everything that I did that day.

Paige: Love that. Yeah, it's important, because it's so wild. It was an eight to ten week internship, depending. I know you all had a little bit of different timeframes, but there's things you do on the first day that you don't even realize that you had done, or it was a training or something like that. So it's great to have that recall and be able to use it either in your studies going forward, or on your resume, or use it to your advantage in different ways. So that's a great idea to journal it.

Shawn: For sure.

Paige: Cool. What projects or tasks would you say that you did this summer that you were most proud of?

Shawn: So I would say I was most proud of the trust project. It consisted of going onto Excel and filling out client data about things that they had in their trust. So I would go into NetX and fill out things like dates, any amendments to the trusts, and just help organize. It was a long project, but we ended up going through every obstacle and finishing it. And I'm proud of it because that was my first time going through actual trusts and reading that, as well as using Excel on a project.

Paige: It's really interesting going from using Excel for school or something like that to actually using it in a work project. But that project was a really big initiative, and it was a really important data hygiene cleanup that you guys did. So I would agree that was definitely one that you guys should be proud of, and it was an important project. What surprised you about how a wealth management firm like Key Financial operates?

Shawn: What surprised me the most was the relationship with the team here and the clients. All the conversations that I overheard were just as friendly as professional. So I feel like that meant a lot to the clients, and it's truly a core value of the people that work here. So I was very surprised by that.

Paige: Yeah. And it's really, we care, and it shows, and we go deep with our clients and really get to know them and understand them and what's most important to them, so ultimately we can help them live their very best lives. So, what is something that you learned on the job that you couldn't have learned in the classroom?

Shawn: Something that I learned on the job was the real life exposure to an in-person meeting. You can hear about it in the classroom; they could tell you what it's going to be like, but you don't have that hands-on experience. When you're in those meetings, you're talking to real people. You're dealing with real scenarios, real finances, and it's real life, and that can't be taught in a classroom.

Paige: Yeah, I would have to agree with you for sure. Shifting gears a little bit here to the big lessons, what is the most important thing that you learned this summer about financial planning or wealth management, or what piqued your interest most around running a business?

Shawn: Yeah, I would say the biggest thing is that being a successful financial planner doesn't just mean you have to make money for someone. It means you have to be able to talk to them, to communicate, and to make connections. And I think that goes beyond being an average financial planner and a great financial planner.

Paige: I definitely agree. And there's such a proactive component to that, right? Of just looking out for their best interest and proactively looking ahead at their scenarios and what they have coming up and things like that. So that's definitely the care that the KFI team takes. How did your understanding of what financial advisors actually do change over the course of the summer?

Shawn: Yeah, so my understanding I would say changed drastically. I came in this summer just thinking that financial planners were a tool to use to help you grow money, but it's way deeper than that. There's so many moving parts. You actually have to deal with clients. You have to talk to them. You have to be able to know their story and know where they're coming from and help them so that they're not just making money, but they're also happy with their decisions.

Paige: Right. And on that note, was there a certain meeting or a certain conversation that you felt really stuck with you this summer?

Shawn: So before one of my meetings, Patti said to me, it's very important that you treat people with care because they will remember. That stuck with me, because in every meeting I sat in with her, she always asked, will you be okay? And you could always see in the clients' faces, it takes a weight off the shoulders, like a deep breath, a sigh of relief. And they feel cared for and very vulnerable, which is great.

Paige: Yes, and it happens to be the title of her book. Am I Going to Be Okay? And Is Okay Enough? What do you know now that you wish that you knew on your first day of your internship?

Shawn: Asking questions is a good thing.

Paige: Yes, it's a great thing, and no matter where you are in your career, it's a great thing. And never stop asking questions. I love that you said that. Looking ahead, where do you see yourself in five years?

Shawn: So in five years, I feel like I will know exactly what I will want to do, because I plan on getting as much exposure as I can to many different things. But from this internship, I really learned that I love connecting with people. I love making connections, talking with them, getting to know people's stories.

Paige: Definitely. How has this summer changed or shaped the direction that you want to go professionally?

Shawn: So I was very inspired by Patti because of the team that she created. They all share her values, and I think to be successful, that is such an amazing thing. Because her team handles their clients as she wants to handle her clients. So it very much inspired me to one day start my own company, but have a supporting cast of people who mirror my visions and what I want.

Paige: It's so important that the people that you hire and the team that you surround yourself with are an extension of you, and you have that alignment of your core values. And it's not something that we just say, right? We truly live it every day for each other and for our clients, which is great. I love that. That's what you're taking with you this summer. What advice would you give to somebody who's a student, either about to launch their career in financial planning or perhaps an internship at a firm like Key Financial?

Shawn: Yeah, so the advice I would give is be curious about everything. Don't just stick to one thing, because if you're curious about everything, you learn a little bit about everything, then it'll help you integrate everything together, and then from there you could focus on one thing and become great at that. But just being curious about everything that goes into it.

Paige: Well, and especially if they're interested in running their own business, right? It's important to know the ops piece, the tech piece, portfolio management, planning, marketing, business development, and the list goes on and on. So I'm glad that you all had that exposure this summer to all of the different departments and the different groups, and really got to know how the business is run.

Shawn: For sure.

Paige: So, Shawn, thank you so much for joining us this summer for your internship. Thank you for joining the Patti Brennan Show. We're so happy to have you here.

Shawn: Thank you so much. I really appreciate it.

Taylor Hansen | Villanova University

Paige: All right, and now we have Taylor joining us. Taylor joined us this summer for her first internship with Key Financial. So, why don't you tell us a little bit about yourself, your full name, what you're studying, where you're studying.

Taylor: My name is Taylor Hansen, and I'm going to be a junior at Villanova University, where I'm majoring in economics and minoring in business.

Paige: Awesome, love it. And what drew you to the Key Financial internship and financial planning and wealth management?

Taylor: I would definitely say my classes at Villanova made me interested in finance, and I've always been kind of a relationship person, building connections with people. So I knew wealth management would definitely be up my alley.

Paige: Yeah, great. And walk us through what a typical day looked like for you this summer during your internship.

Taylor: So normally I get in, restock the fridges, restock all the printers, things like that. But I like that every day is kind of different. Some days I'm doing Excel projects, putting clients' information into the CRM system. Some days I'm going into client meetings or hearing about what people do at Key Financial and their jobs. But yeah, every day is kind of different. I like getting a little bit of everything.

Paige: Yeah, you got great exposure to all the different departments and the different areas of the company and how we operate and all of that, which is really cool. On that note, what would you say is a project or a task that you're most proud of?

Taylor: I did a project with Grace, going through over 2,000 clients' information. We went through their POA, CPA, attorney, and updating some of the documents and putting it into the CRM system. And it did take a while, but in the end, it was all worth it. It was great to see all of the hard work we've done, and it was also great exposure to seeing those different documents because I've never seen that in school.

Paige: Yeah, and those types of projects, we call them data hygiene projects, it really goes such a long way. We're going to see the fruits of that for a long time. So we're really appreciative. I know it took a while, and I'm glad that it was worth it.

Paige: What surprised you about how a wealth management firm like Key Financial operates?

Taylor: Definitely the relationship part of it. That was something that really stuck out to me. I mean, coming in, I just thought of it as you're providing a service to someone, but that's just the tip of the iceberg. At the end of the day, clients are coming in and they're trusting you with their finances, with building these long-term plans, and that's just something I wasn't used to, and I didn't expect. Like when they would start the meetings, instead of let's look at the numbers or the plans, it was more of like, how are your kids? I heard they're going to college soon. How's the dog? All just these little details that I just didn't expect.

Paige: Yeah, it's a very personal relationship, and we certainly go deep and wide with our clients when it comes to the level of care and how we get to know them. What would you say is something that you learned here that you wouldn't have learned in a classroom?

Taylor: Definitely the meetings aspect of it. I mean, you hear about them in class, like how they work, but just sitting in on them and seeing how we interact with clients is such an important part. Like I said, just learning about the clients themselves, it was just interesting to hear. I was like, oh, you went to Villanova? Well, that's interesting. I went to Villanova. But that's just something I never had exposure to before. And also doing the Excel projects and going through those documents. I mean, you hear about them, but you're not allowed to see that personal information.

Paige: For sure. Shifting gears a little bit to lessons. What is the most important lesson that you learned this summer about financial planning or wealth management?

Taylor: I would say just building connections with people, because you never know where that could go. Again, like when I was in those meetings, I didn't know who they were when they came in the door, but after it, I feel like I knew everything about them, and we had so many similarities. So I would just say building connections goes a long way, especially in this industry.

Paige: Definitely. And how did your understanding of what a financial advisor does change throughout the course of the summer?

Taylor: I would definitely say I didn't really expect how integrated it would be between all the different departments here. I mean, just everyone working together. I didn't expect all the work that goes behind the scenes to make sure all the plans are put together, portfolios, so all the work that goes into prep and everything.

Paige: Was there a moment or a conversation that you were part of or that you experienced this summer that really stuck with you?

Taylor: I was in a meeting with Patti, and it was with a prospect, and she told the prospect that clients are not their money. And that really stood out to me because it shows that she really wants to build a true relationship with them, as much as it's her job to be in charge of their money and what she wants to do with it. At the end of the day, like I said, it's all about building trust and building relationships with people, because in this industry, it's not just about meeting people for one to two years. It's like a lifetime long thing.

Paige: Yeah, it really is. And what would you say is something that you learned throughout this summer that you wish you knew on the first day of your internship?

Taylor: I would just say be relaxed, be confident. It can be so scary going into a new environment, but you just gotta take it as it is. And especially don't be afraid to mess up. Everyone makes mistakes. You just have to own up to your mistakes and just learn from them. But yeah, just be relaxed and confident. It's all gonna work out.

Paige: Which is great advice for anybody at any point in their career. So thank you for sharing that. Looking ahead, where do you see yourself in five years?

Taylor: I can definitely see myself in something like wealth management. I really like the relationship management side of things, the client facing focus. So that's something I'm looking to pursue. I'm hoping that I'll stay close to all my friends and family, and I hope that I have a dog in five years.

Paige: What kind of dog?

Taylor: I'm hoping for a mini goldendoodle. That's what I have now. Her name's Parker, and she's perfect.

Paige: Oh, I love that. That's awesome. How has this summer changed or shaped the direction that you want to go professionally?

Taylor: I definitely, like I said, relationship management completely. I love talking to people. I love helping people. It's a passion of mine. Relationship management for sure.

Paige: Cool. And what advice would you give to a student who is either looking at an internship in financial planning or looking to launch a career in financial planning and wealth management?

Taylor: I would definitely say talk to upperclassmen, especially if they've done an internship in finance. It's such a great way to see what they did and if it would be of interest to you. Also, so many colleges have resources, the career center, and also just different websites like LinkedIn, Indeed, Handshake. Just expose yourself to different things. Also, I feel like the job search can be super stressful, so you just gotta relax, worry about yourself. Don't worry about what other people are doing. At the end of the day, you just have to do what's best for yourself.

Paige: Definitely, and keep your eyes wide open, right? Because there are, like we were saying, so many different careers within financial planning and wealth management. Just here alone, there's so many different departments across ops and tech and the KCS team, portfolio planning, marketing, growth, and so on and so forth. And that's one firm. So within finance, there's so many different avenues that someone can go. So very cool. Well, thank you for joining the Patti Brennan Show. Thank you for joining us this summer for your internship, Taylor.

Taylor: Thank you.

Closing

Paige: Thank you again to our incredible interns for joining us for your 2026 summer internship at Key Financial. We are so proud of all of the work that you did and everything that you brought to the table here at Key Financial. We're really excited to see where you go from here. To our listeners, thanks for tuning in. Take care.
