

NEWS

For Immediate Release

Media Contact:

Colin Swift

Impact Communications, Inc.

913-649-5009

ColinSwift@ImpactCommunications.org



Charles Schwab Foundation Commits To Five-Year Platinum Level Partnership with The BLX Internship Program

*BLX Will Soon Close Application Window for Financial
Planning Firms Interested in Hosting a 2024 Summer
Intern*

Atlanta, GA (December 5, 2023) – [The BLX Internship Program](#) (BLX), a 501c(3) organization that provides an entry point to the financial planning profession for Black and Latinx individuals to increase diversity in the industry, announced that Schwab Advisor Services in partnership with the [Charles Schwab Foundation](#) (Schwab) has announced a five-year commitment to the BLX program at the platinum partnership level. The agreement gives the foundation the opportunity to provide educational materials, software licensing, and educational webinars for the BLX community.

“Attracting diverse talent that brings a range of perspectives, experiences, and backgrounds that reflect the people and the world around us is essential,” said **Bernie Clark, Head of Schwab Advisor Services**. “**The BLX Internship Program is an access point that provides an opportunity for meaningful experience for future financial professionals that will shape the future of the RIA industry.**”

“We are thrilled to announce this partnership with such an industry pillar,” said Chloe Moore, firm owner of Financial Staples and co-founder of the BLX Internship Program. With this five-year commitment, we will have the financial resources to provide even more value to our interns through educational opportunities, scholarships for certifications, and scholarships to conferences.”

APPLICATION WINDOW FOR INTERNS AND FIRMS ABOUT TO CLOSE

BLX's application window for the 2024 summer internship program opened on October 1, 2023, and runs until December 31, 2023. BLX co-founders Luis Rosa and Shawn Tydlaska have created two compelling videos urging fellow financial planners and investment advisory firms to get involved.

For financial planning firms, BLX provides a pool of qualified and diverse candidates, screened to guarantee a quality matchmaking process specific to the firm's needs. With the talent shortage still a concern for many financial advisory firms, and given the industry's ever-increasing commitment to creating a more diverse workplace, the time is now to get involved. Firms interested in participating in the internship program can learn more here: <https://www.blxinternship.org/for-firms>.

"With the BLX Internship Program, you will get access to a diverse pool of highly qualified and hungry candidates," said Shawn Tydlaska, firm owner of Ballast Point Financial Planning and co-founder of the BLX Internship Program. "This is a great way to develop your talent pipeline, because you get to test drive your new team member for the summer to see if they are a good fit for your firm and clients."

Aspiring Black and Latinx interns who participate in the program get a first-hand, behind-the-curtain view into what working in the financial planning profession is all about. Internships also provide an opportunity to develop interns' soft skills, hone their financial skills, and grow their network of high-achieving professionals. Those interested in applying for an internship can learn more here: <https://www.blxinternship.org/for-interns>.

WEBINAR SERIES CONTINUES

BLX is hosting a series of webinars throughout the month of December. Webinars will provide information to both aspiring financial planners as well as firms that want to host interns. By attending a webinar, interns will glean important info about the program and learn how to powerfully and authentically position themselves as well. Firms will learn about the program and how the matching process works. Interested parties can find out more and register here: <https://www.blxinternship.org/events>.

DIVERSITY IN ACTION™ PODCAST, SEASON 2

BLX also announced that the second season of their podcast is airing during the application window, which ends December 31, 2023. The Diversity In Action™ series highlights both past interns who share their experiences as well as industry leaders who are making demonstrable strides to make the profession more diverse. Episodes are typically released on Tuesdays and can be found on all major podcast platforms.

ABOUT BLX INTERNSHIP PROGRAM

In the wake of George Floyd's death, and in the spirit of the Black Lives Matter movement, the BLX Internship Program was created by four financial planners who had a vision to change the complexion of the financial planning profession. The goal is to place aspiring Black and Latinx financial planners with meaningful paid summer internships and to help make the demographics of the financial planning and investment advisory profession more

closely match the demographics of the USA. This program is open to both college students and career changers. Learn more about the BLX Internship Program at BLXInternship.org. Follow BLX on [LinkedIn](#), [Instagram](#), and [X](#).

###