

University of Texas at Dallas
Student Goals, Objectives, & Expectations

Jindal School of Management Internship

Instructor-of-Record: S. Drew Peabody

Student Name: Mariama Ndimbalan
Email: mjnl50230@utdallas.edu
Degree: Finance

Phone #: (770) 407-9740 (H)
() (W)
Graduation Date: Summer 2021

Site Supervisor Name: Ryan Nettleship

Phone #: (817) 271-0266

Title: Sales Onboarding Coach
/Supervisor

E-mail Address: ryan.nettleship@fmr.com

Fax #: _____

Work Site: Fidelity Investments

(Complete name of employer/company)

Location Address: 1 Destiny Way

Westlake TX, 76262

Street

City, State, Zip

Student:

1. After discussion with your supervisor, fill out the second page.
2. Obtain the required signature, indicating your supervisor's approval of your goals.
3. Submit as per the deadline as listed in the course syllabus, by uploading to eLearning. If, by chance, your start date is within 10 business days of the deadline listed in the syllabus and you need an extension, please contact the course instructor for an extension.

I have reviewed the Goals and Objectives as stated on the following form.

Signature of Site Supervisor

04/14/2021
Date

Signature of Student Intern / Co-operative Worker

04/14/2021
Date

University of Texas at Dallas
Internship/Co-op Goals, Objectives, and Expectations for:

Student Mariama Ndimbalan_____

Employer Fidelity Investments_____

List at least 3 specific learning goals/objectives for the semester:

- My goal is to pass the series 63 and 7 exams to be able to answer, client's personal finance questions accurately.
- Ask accurate questions to clients, to see what kind of financial planning they are needing, and how we can support them achieve their financial goals.
- It will be my pleasure to connect clients with Fidelity workplace consultants, to discuss a holistic retirement plan.