

Dear Intern Candidate:

As part of our getting-to-know-you interview process, we would like to see your original work while giving you an opportunity to experience how we perform some of our work.

**Exercise**

The exercise is to research and list a few companies in a market vertical.

**All of the information can be found freely on-line.**

The exercise is also to show your star abilities with creating a document – **formatting matters so please make your work beautiful.**

**Excel, Word, PowerPoint**

You can present your findings in an Excel spreadsheet or a Word document as long as it can print out onto **one sheet of paper.**

Also prepare a **one-page** PowerPoint about the industry, showing how the companies you selected rank in the industry.

*Do not make a pdf – send in the original format.*

Below is an image showing a sample of how we create a list of companies in a market vertical.

The schedule lists where you can buy their products, their brands, the name of the CEO or President, direct contact information of their email and their direct phone or cell phone (*no 800 numbers*), and other information about the company including their logo.

**Create an original, one-page document to show your skill in finding information --> List 3 to 5 privately-held companies from one industry and key information about each.**

LOGO	Company Name	Contact Name	Title	email	Cell Phone	Office Phone	Website	Revenue	Source	Date	Brands	Product Description	Sold Through
	LAMB, Inc.	Mary Smith	Founder	Mary@Lamb.net	222-222-2222	555-555-5555	lamb.net	\$55.5M	ZoomInfo	9/14/22	Woolly	Socks made from Australian Wool	Macy's, TJMaxx, Ross
	CLOTHING Co.	John Jones	CEO	jjones@clothing.co	999-999-9999	777-777-7777	clothing.co	\$76.3M	Hoovers	9/15/22	ShirtOut	Shirts that you don't need to tuck in	Nordstrom's, Bloomingdale's
	PANTALOONS & C	Pat Doe	President	DoeP@Pantaloons.com	686-888-6666	333-333-3333	pantaloons.com	\$32.6M	Manta	9/16/22	Panther	Pants that stretch to your body shape	Amazon, DTC company website

*This example is of apparel companies that are privately-held.*

Your exercise is to:

1. Look at the **market vertical** described in the email.
2. Select 3 to 5 **privately-held** companies (not-publicly traded) that are based in the USA
3. Prepare a document in Excel or Word in a format similar to the above image.  
**Formatting:** Your formatting matters, please make your results look as professional as possible. Include color highlights.  
**Printability:** Prepare the print area so that it can print on **one page**, landscape.
4. Express your findings about the **industry / market** and recent consumer trends that you learned from doing this exercise and present on **one page** using **PowerPoint**.  
Include an estimate on the market size in the USA. Show how the companies you selected fit into this market.
5. email your results to us in advance of our conversation.

We look forward to our conversation and learning about your observations.

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## **QUESTIONS ABOUT OUR INTERNSHIP:**

### **1-Can this internship be done remotely or in-person**

The internship is best done on-site in our office. Working interactively with other team members will give you the best experience. We are located about a mile west of UCLA (Wilshire x Federal).

The internship may also be accomplished excellently when done remotely. When remote, there are frequent meetings with us throughout the week via Zoom or Meet or WhatsApp. In between meetings, you work on projects involving data research.

### **2-Is this a paid Internship**

The internship is not compensated. On average, our interns participate 20 hours per week, around their own schedule of availability. There are many rewarding benefits from the experience that can be useful for your future in business. After the Internship period, there may be an offer of employment.

### **3-Work - Can you provide a paragraph on the work provided**

We have a great opportunity with our firm that would match with a focus on Private Equity, M & A, Investment Banking. Our industry is Investment Banking. Our focus is on transactional business involving a considerable amount of data management. The internship involves real business projects that require data research on companies in select industries and organizing the information. We have frequent discussions and analysis of the companies under review and the trends in the related industries. An Intern will learn about data management, use of a CRM, how to evaluate Consumer Product and SaaS companies.

### **4-What background should the intern have**

An intern's area of study / background is best if in economics, finance, accounting, or computer science.

**The ability to use Excel is expected. The ability to use Word is expected.**