

CAREER GUIDE – FINANCE

Finance jobs are found in nearly all corporate, public sector, and non-profit organizations. Key areas include corporate or public finance, banking, and investment services.

Career To Do List

First Year



- Take MGMT 1200, Career & Professional Development in your first or second semester

Sophomore



- Select classes and projects that will help you build your knowledge and experience.
- Work with BCC on your resume and LinkedIn profile
- Explore career options with BCC and determine knowledge/experience gaps so you can fill them in your Junior and Senior years

Junior



- Take Finance and business classes that will build on your career plan; consider an Intermediate Accounting class to go deeper into financial statements and their interaction
- Fine-tune your resume and attend Workshops, Career Fairs and Employer Spotlights; apply for internships (some are filled by December). Do not procrastinate.
- Apply for a student club committee and help organize an event

Senior



- Consider an additional internship and fill experience gaps with academic projects
- Keep your eye on job postings and target employers and roles
- Update your resume and LinkedIn profile. Attend an Interview Prep Workshop, Employer Spotlights, and Career Fairs – further develop your network and refresh your connections
- Improve your advanced Excel and financial modeling skills.
- Apply for a student club leadership role; benefit from the experience and networking connections.

ADDITIONAL FINANCE CAREER INFORMATION

www.cofpa.org | www.cfainstitute.org | www.cfp.net

IN DEMAND SKILLS

Advanced Microsoft Excel, Microsoft Access, SQL

Financial Modeling, Financial Functions, and Financial Statements (NPV, IRR, PV, and the Statement of Cash Flows and supporting schedules in addition to Income Statements & Balance Sheets), Bloomberg, Morningstar, thinkorswim

Check out www.asimplemodel.com for help with modeling; free with a quiz subscription of \$3/month
Advanced Excel courses are readily available online; one resource is www.wallstreetprep.com for \$39
Contact matthew.fleming@ucdenver.edu for Bloomberg, CQG, Morningstar, and thinkorswim tutorials

FINANCE | COMMODITIES – CERTIFICATIONS

SIE (Securities Industry Essentials) – may be taken without employer sponsorship

Chartered Financial Analyst (CFA); Certified Financial Planner (CFP)

Certified Fund Specialist (CFS); Commodities Trading Advisor (CTA)

Series 6 (Mutual Funds); Series 7 (Stocks); Series 63/65/66 (State Law Exam)

Series 79 (Investment Banking)



Preparation is Key to Career Success

Academic

Take great classes and complete projects in your area of emphasis. Consider certificates in Commodities or Risk Management. Make your GPA count. 3.0+ is preferred for Finance students.

Internships

Finance internships will help you gain skills and get a great job when you graduate. Advanced Excel and financial modeling skills are essential for many internships.



Career Prep

It is important to learn how to excel in the job search process. It will help you get the job you deserve and will help you throughout your career. Your first job will not be your last job.

FINANCE CLUBS

CU Denver Business School – Portfolio Management Group (Highly Recommended)
CU Denver Business School – Beta Alpha Psi (Accounting-focus, but open to Finance students)
Participate in the CFA Research Challenge to increase your skills.

FINANCE JOB TITLES – EARLY CAREER

- Budget Analyst
- Compliance Analyst
- Credit Analyst
- Financial Analyst
- Investment | Portfolio Analyst
- Operations Analyst
- FP&A Analyst
- Loan Officer | Banker
- Broker
- Trader | (Commodities, Derivatives, etc.)
- Financial Advisor | Consultant
- Fixed Income Associate
- Equity Research Associate
- Retirement Associate
- Underwriter
- Asset Analyst
- Wealth Advisor

FINANCE EMPLOYERS

- Public and Private Corporations
- Startups
- Banks – Retail, Commercial, Investment
- Public Accounting Firms
 - Audit or Advisory Practices
- Financial Services | Investment Services
- Government Agencies and Universities
- Non-Profit Organizations
- Private Equity and Venture Capital Firms
- Consulting Firms
- Commodities Companies
- Commodities Departments



BUSINESS SCHOOL
BUSINESS CAREER
CONNECTIONS