

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.

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. LinkedIn Learning (free for our students) has two courses that we recommend: Excel: Advanced Formulas and Functions, and Financial Modeling Foundations. Contact Erica.Hyman@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)



ADDITIONAL FINANCE CAREER INFORMATION
www.cofpa.org | www.cfainstitute.org | www.cfp.net

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

TAKE ADVANTAGE OF LINKEDIN LEARNING
(AVAILABLE FREE IN UCDAACCESS) TO INCREASE YOUR
KNOWLEDGE OF CONCEPTS AND IN-DEMAND SKILLS.

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

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