GET AHEAD GUIDE:
Finance - Banking

1. Learn about the industry and specific firms

- **Career Programs:** Deconstructing Wall Street, Banking Boot Camp, Training the Street Corporate Valuation Workshop, Q2, Spiders on Wall Street Road Trip, SpiderShadowing, Firm Info Sessions and Office Hours
- **Clubs & Coursework:** Finance Society, FinTech, SMIF, Gateway Capital Management, AKPsi, DSP, International Business Association, Women in Business, FIN 360
- **Networking:** Informational Interviews and Internship Search Support Conversations with Alumni (find on SpiderConnect & LinkedIn), Firm Recruiters, Faculty, and Personal Contacts (including fellow students)
- **Online Resources:** Vault Guides, Occupational Outlook Handbook, Wall Street Oasis, Mergers & Inquisitions, Wall Street Journal, Economist, Bloomberg

2. Understand banking recruiting timelines

- **Recruitment for FIRST YEAR & SOPHOMORE internships and short-term summer leadership programs** occurs in winter and spring. Firm summer programs often have a diversity focus and run for 1-5 days.
- **Recruitment for JUNIOR summer internships** begins in the spring of Sophomore year and goes through summer and fall of Junior year. Ideally most Junior summer internships result in full-time job offers (to take or leverage).
- **Select firms will post full-time roles for SENIORS** on SpiderConnect and/or come on campus to interview in the fall of Senior year.

3. Take initiative and plan ahead

- **Sign up for the Finance Distribution List** in your SpiderConnect profile to get industry-specific weekly updates
- **Take advantage of a Mock Interview:** Behavioral and/or Technical
- **Self-Study and Certification:** Bloomberg Market Concepts Certification (on-campus in RSB terminal (FREE) – highly recommended, at select public libraries (FREE), or at home self-paced ($149 student price from Bloomberg))

4. Search and apply strategically for summer internships

- **Set up a Saved Search** in SpiderConnect for relevant internship and externship opportunities, based on keywords, firm names, locations, or other key criteria; it will email you new postings that fit your interests
- **Create a resume using the UR Finance Template and upload into SpiderConnect.** Give yourself lead time, as your document will go through the Career Services “Resume Check” process before you can apply for opportunities.
- **Craft Cover Letters** to target your organizations and opportunities of greatest interest. Spend more time on the “why you” (how you best match the job description) than on the “why them” (describing your interest in the field).
- **Apply with complete materials** on both SpiderConnect AND firm websites, following instructions carefully.

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5. Regularly evaluate your efforts related to:

- **Gaining Relevant Experience**, including internships, shadowing, projects, student org leadership, and self-study
- **Honing In-Demand Skills**, including data analytics, Excel, leadership/teamwork, adaptability, resourcefulness
- **Progressing Academically**, including taking relevant courses and maintaining a strong GPA
- **Creating and Maintaining Relationships**, including keeping in touch with alumni, personal contacts, and peers/classmates with experience at firms of interest
- **Getting support from Advisors and Mentors**, including career and academic advisors, faculty, friends, and family

6. Widen or narrow your professional focus

- **Consider Your Priorities and Flex Points**: Organization Size and Scope, Location, Specific Responsibilities
- **Engage in New-to-You Career Programs**: Spider Road Trips for Accounting, Consulting, Entrepreneurship & Innovation, or Marketing; Career Expos; A&S Next; Deconstructing Wall Street, Marketing, and Health; Employer Info Sessions

7. Weigh your options and take appropriate action

- If you get a summer intern-to-full-time conversion offer, talk with a Career Services advisor ASAP, to help you consider possibilities and make a sound decision. We can help with targeted negotiation and networking.
- If you haven’t received or accepted an offer over the summer, continue to apply for relevant opportunities, based on your newly-earned knowledge and experience of what you want to do after graduation (and where). New jobs and internships are posted to SpiderConnect daily, and we host On-Campus Interviews year-round.
- If you don’t want to continue with Finance as your chosen profession, there are many other fields where your skills and experiences would be transferable. Career Services can provide insight and direction as you recalibrate.

8. Stay connected professionally

- Update your network on your plans and progress
- Continue meeting and talking with professionals in the field to prepare for entry-level and long-term success. This includes joining relevant professional associations and attending conferences.
- Consider additional trainings, coursework, and self-study you could complete to hit the ground running at work

9. Pay it forward

- Offer to attend Career Services programs and share your story/offer support
- Conduct mock interviews, stock pitches, and other practice with first-year, sophomore, and junior students
- Encourage your future, current, and/or past employers to recruit at UR for interns and full-time hires
- Fill out the First Destination Survey before graduation so Career Services can record and share your outcomes.
- Get involved with the Alumni Association, as engagement opportunities for young grads are constantly growing