

CAREERS IN FINANCE



If you find yourself thinking in numbers or pondering how the money market works then a career in finance might be for you. Finance is one of the largest and most diverse sectors when it comes to entry-level jobs.

Entry-Level Roles in Finance

FINANCIAL ANALYST:

Financial Analysts provide advice and guidance to a company or client around purchasing and selling investments, which could include stocks, bonds, and mutual funds. The job consists of analyzing companies, industries, and economic trends to help decision-makers anticipate financial risks and opportunities.

Plan your path:

- **Where you will find these roles:** Typically Financial Analyst roles can be found in banks, consulting firms, and other corporate entities.
- **How to get an edge:** Most companies will look for previous experience including internships or part-time jobs in the industry.



You can make yourself stand out more by pursuing the first-level CFA.

CREDIT ANALYST:

Credit Analysts review a company's or individual's creditworthiness to assess if there risk associated with lending to them. As a Credit Analyst, you make recommendations on how much can be borrowed and what is the likelihood of default on a loan.



These roles are often found in banks, credit card companies, and corporate finance departments.

Plan your path:

- **Education required:** While a college degree is not required for entry-level, your earning potential could increase twofold with a Bachelor's degree.
- **Preferred skills:** Aptitude for numbers and analysis, a strong technical background, and detail-oriented.





DATA ANALYST:

Data Analysts analyze data from stocks and inventory as well as sales in order to help provide direction to a company on expansions, investments, and acquisitions.

Plan your path:

- **Education required:** Typically you can start in this role with a bachelor's degree but in order to progress further it is highly recommended to get an advanced degree.
- **Preferred skills:** The ability to spot patterns in data and higher-level data systems knowledge. It is important to highlight your aptitude with specific technological software or tools during the recruiting process.

WEALTH MANAGEMENT/FINANCIAL PLANNER:

Wealth Managers and Financial Planners work with individual clients rather than businesses. Work may consist of creating budgets, suggesting ways for clients to reach savings goals, and advising clients on how to invest their money. Part of your role will likely include a sales component to find new clients.

Plan your path:

- **Education required:** Typically these roles only require a bachelor's degree of any kind.
- **Preferred skills:** Advanced Excel skills, basic understanding of computer science, communication, sales, and data analytics.

ACCOUNTANT:

As an accountant, your job is to maintain financial records and generate income statements/reports that highlight expenses, losses, profits, and tax liability. In this role, you identify and communicate the financial implications of business decisions.

Plan your path:

- **Education required:** A bachelor's degree in a business-related field is required, and additional certification (like the CPA) may be required if you are interested in working in public sector accounting.
- **Preferred skills:** Strong knowledge of accounting principles, detail-oriented, good communication skills, and analytical abilities.

