

PATH TO WALL STREET



For students who have the interest, talent, and ambition, Loyola faculty and the Career Center work together to make sure Wall Street is a real, achievable option.

“When I chose my finance major, my parents had peace of mind knowing that I was taking the necessary steps towards a successful future in a field that I was very passionate about.”

—MARY, SOPHOMORE, FINANCE MAJOR

Develop Skills



- POWERPOINT PRESENTATIONS
- EXCEL MODELING
- BLOOMBERG CERTIFICATION
- MORNINGSTAR CERTIFICATION
- ADMINISTRATIVE WORK
- MEETING COORDINATION
- TRIP PLANNING

Online Assets



- VET YOUR ONLINE REPUTATION & SCRUB YOUR DIGITAL PRESENCE
- CREATE YOUR LINKEDIN & HANDSHAKE PROFILES

FIRST STEP

Set up your four-year plan with your Messina advisor immediately.

◆ **Essential**

■ **Recommended**

FIRST YEAR

This is the year for you to explore and broaden your interests. You'll need a strong academic and intellectual foundation to prepare you for a career in finance on Wall Street.

FALL

- EC 102 Microeconomic Principles
- MA 151 Applied Calculus or MA 251 Calculus I
- CS 105 Making Sense of Data

SPRING

- ◆ **AC 201 Financial Accounting**
- EC 103 Macroeconomic Principles

FRESHMAN SUMMER INTERNSHIP

Prove you're a hard worker with a strong work ethic. You don't have to take a job in finance. Find an opportunity to show initiative and dependability as a professional.

CHARACTER TRAITS

- HARD-WORKING
- PROACTIVE
- PASSIONATE
- PERSONABLE
- DILIGENT
- TRUSTWORTHY

OTHER INTERESTS

- GEOGRAPHY
- LITERATURE
- MATHEMATICS
- PHILOSOPHY
- DATA VISUALIZATION
- GLOBAL EVENTS

CO-CURRICULARS

- SPORTS
- STUDENT CLUBS
- SERVICE
- RESEARCH PROJECTS
- FOREIGN LANGUAGE
- MENTORING/TUTORING

SOPHOMORE YEAR

Take this year to set the stage for your networking opportunities. If you choose to study abroad, try just one semester and network and explore internships throughout the year.

FALL

- ◆ **FI 320 Financial Management**
- EC 220 Business Statistics
- *Apply to Study Abroad*

SPRING

- ◆ **FI 330 Junior Financial Analyst**
- ◆ **FI 322 Investments**

SPECIFICALLY DESIGNED FOR STUDENTS WHO WANT TO WORK ON WALL STREET

Study Abroad

Fall of junior year is when summer internship interviews occur. Think about studying abroad in spring or summer. Attend an info session to help you choose the best program for your major and schedule. A few programs to consider:

- | | |
|-----------|----------------|
| AUSTRALIA | JAPAN |
| CHINA | NETHERLANDS |
| DENMARK | NEW ZEALAND |
| FRANCE | SINGAPORE |
| GREECE | SPAIN |
| IRELAND | UNITED KINGDOM |
| ITALY | |

SOPHOMORE SUMMER INTERNSHIP

Working in a financial institution this summer is great, but it's most important to be passionate and continue developing the skills and traits that banks are looking for.

“During their first year, students need to attend career fairs or informational sessions to begin the process of networking. Developing those contacts can be helpful in their search for a full-time position.”

—JIM FORBES, '80, VICE CHAIRMAN OF US INVESTMENT BANKING BUSINESS, UBS GROUP AG



APPLY FOR JUNIOR SUMMER INTERNSHIP

Start applying for positions as early as September 1.



Seek Out & Attend Networking Events

SAP Fund

SELLER APPLIED PORTFOLIO FUND



A student-managed fund that provides actual portfolio management experience and exposes them to the portfolio management process.

JUNIOR SUMMER INTERNSHIP

You have long, hard weeks ahead of you. Firms fill most of their full-time roles with successful summer interns. Stand out through your work ethic and teamwork.

“As a new hire, you need to show you are hungry and driven. Be the first one in every morning and the last one out every night. Make every minute on the job count and put all your effort into the task at hand.”

—ANDRE JABBAN, '13, PORTFOLIO MANAGEMENT ASSOCIATE, MORGAN STANLEY

JUNIOR YEAR

You've finished your summer internship and should be applying for your next one. Focus on determining which field to work in. Turn to Loyola's Career Center for help with interview skills and developing your résumé.

FALL

- FI 340 Global Financial Management
- FI 350 Financial Modeling

SPRING

- FI Elective

SENIOR YEAR

As you start this year, you will be applying for full-time positions where you interned. Take as many classes as you can to prepare yourself for your new job.

FALL

- FI 440 Financial Analysis and Valuation
- FI 434 Student Managed SAP Fund

SPRING

- FI 441 Advanced Financial Management



APPLY FOR FULL-TIME JOB

Try to convert your junior summer internship to a full-time job.

The Career Center has the tools you need to get to Wall Street.

Make Your Résumé A 30-Second Success



Employers spend only 30 seconds looking at your résumé. Make it count.



But they aren't from HR—they're the analysts you met at a networking event.



What is going to stand out? Experience, GPA, and interests. Let your strengths shine!



Highlight two or three leadership examples you want to communicate.

HEADER

- **Name:** They should recognize your name from networking events.
- **Mailing Address:** Use your Loyola address, and expect to travel.
- **Email Address & Phone Number:** Provide a professional email address.

EDUCATION

- **University:** No high school references
- **Major & Expected Graduation Date**
- **GPA & SAT:** If your GPA isn't >3.4, list your Major GPA. Don't include your SATs unless above 1400/2100.
- **Honors, Coursework & Projects**

WORK & LEADERSHIP EXPERIENCE

- **2 to 4 Entries:** Include clubs if you don't have enough internships or jobs.
- **Choose an Approach:** Decide if you will be project- or task-centric.
- **Results:** Provide measurable results of your work. It's all about results!

SKILLS, ACTIVITIES & INTERESTS

- **Be Memorable:** Focus on your interesting skills that help you stand out.
- **Be In-Depth:** Describe key items; don't just provide a laundry list.
- **Be Relevant:** List relevant technical skills, certifications, and training.

Getting To NETWORKING → EARLY INTERVIEW ROUNDS →

SUPERDAY

The Final Interview for Competitive Internships



This is where you can start meeting people in your field:

- Attend Info Sessions
- Explore Networking Opportunities
- Find a Mentor
- Enroll in Online Seminars



Don't be shy. Introduce yourself.



Ask for their business card.

You will have one or two rounds of interviews to get to Superday. Here is what you should prepare for:



Your first interview will probably be on the phone, so practice with The Career Center.



They will ask technical and behavioral questions to ensure you have the skills to do the job.



Be ready to clearly articulate why you want this specific internship at this particular firm.

ARRIVAL



- Firm flies you out for interview.
- Attend a small evening event. These can be part of the interview process, so behave professionally.

SUPERDAY



- Go to office and obtain your schedule.
- Meet other interviewees. Don't view them as competition; be sure to network.
- Interview with various hiring groups throughout the day.

Choosing Your Office

No firm on Wall Street is all rainmakers. So where do you fit in? Here are some examples of the different positions our Path to Wall Street will make available to you.

FRONT OFFICE

The front office generates the bank's revenue, helping clients raise money in capital markets, advising clients on mergers and acquisitions, buying and selling products, and producing reports about future earnings prospects.

FRONT OFFICE DIVISIONS

- Investment Banking
- Sales & Trading
- Research
- Commercial Banking

CLIENTELE

Customers

MISSION

Generate revenue

SALARY*

Entry Level Est.
Base: \$84.2K
Bonus: \$37.6K

MIDDLE OFFICE

The middle office ensures the investment bank avoids engaging in certain activities that could be detrimental to the bank's overall health, such as taking on too much risk in underwriting certain securities.

MIDDLE OFFICE DIVISIONS

- Risk Management
- Financial Control
- Corporate Treasury
- Corporate Strategy
- Compliance

CLIENTELE

Front Office

MISSION

Evaluate risk in the market

SALARY*

Entry Level Est.
Base: \$65.9K
Bonus: \$9.5K

* Weighted Averages of New York City firms from LinkedIn, January 2018

Career Services Support

Visit Loyola's Career Center to discuss your career-related values. Take an interest assessment and reflect on your strengths early on to evaluate your match for a career on Wall Street.

Be introduced to alumni on Wall Street to learn about their experiences, attend info sessions and career fairs, and get connected to finance-related clubs.

SELF-DISCOVERY

EXPLORATION

ACTIVE PURSUIT

PREPARATION

Attend career fairs and on-campus info sessions, maintain and keep building your network of alumni on Wall Street, and apply to a large number of firms.

Match your résumé to the expectations of Wall Street firms, attend an *Acing the Interview* prep course and engage in practice interviews, and make a plan to research and pursue firms of interest.



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loyola.edu/careercenter