

Northwestern Career Advancement

Finance Four Year Career Plan

First Year - Financial services is a broad industry with a wide variety of job functions. Your first year is a great time to explore the breadth of this industry and how it aligns with your interests.

ASSESS

- Reflect on which activities and experiences you've enjoyed in the past and why.
- Identify your interests, values, and skills by taking the career and personality assessment offered at NCA.
- Consider the alignment between your skills, values and interests and a career in financial services.

EXPLORE

- Get involved in student organizations where you can explore your interests and build your skillset through different committees or positions (i.e. Investment Management Club, Undergraduate Real Estate Club, LEND, Women in Business).
- Attend campus events sponsored by NCA, academic departments, and/or student organizations to explore the finance industry and financial careers.
- Enroll in a range of courses that will allow you to learn about fields that interest you and learn relevant skills.
- Speak with upperclassmen you know pursuing careers in finance to better understand the range of opportunities and position functions.
- Build your awareness of markets and financial news using resources like: The Wall Street Journal, Morning Brew, Finimize.

DECIDE

- Conduct informational interviews with Northwestern alumni, industry experts, and/or personal contacts.
- Consider opportunities (research, internships, part-time work) that will introduce you to a professional work setting and help you develop new skills. Be open to experiences outside of finance as they may help you develop skills relevant to the finance industry.

ACT

- Convert your high school resume into a professional document and enhance your document using VMock.
- Create a LinkedIn and Our Northwestern profile and build your network by finding and requesting connections with alumni and other professionals.
- Utilize Northwestern Network Mentorship Program to find a mentor in the finance industry.
- Actively use Handshake - create a public profile, indicate your career interests, review postings and explore events (in order to receive the NCA Finance Newsletter, be sure to select "Financial Services" as one of your career interests).
- Pursue opportunities using targeted resumes and cover letters.
- Enhance your Excel/spreadsheet skills through trainings, events, and/or hands-on experience.

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Sophomore Year- Throughout your sophomore year, use the information you have gained from your coursework, student organization involvement, internships, and networking to narrow the scope of your interests.

ASSESS

- Reflect on your first year of college, specifically on what you learned about yourself and your skills, interests, and values.
- Evaluate how your skills and interests align with a career in finance.
- Begin to develop a professional introduction and career narrative (the story you want others to know about your career interests).
- Engage with your career adviser to work on an effective internship search strategy that will showcase your experiences and accomplishments.

EXPLORE

- Use LinkedIn and Our Northwestern to view profiles of alumni who studied your major and work in the financial services industry.
- Enhance your leadership experience within your student organizations by chairing a committee, initiating a project or managing a budget.
- Build your awareness of markets and financial news that impact industries/divisions of interest to you via resources like: The Wall Street Journal, Morning Brew, Finimize.
- Conduct informational interviews with alumni, industry professionals, and personal contacts.
- Review employer career pages to explore company missions and read about position functions.

DECIDE

- Meet with a career adviser to discuss a strategy for gaining related experience.
- Declare an academic major(s), minor(s), and certificate program(s); meet with University Academic Advising if you are considering an interschool transfer.
- Prioritize maintaining a strong academic record, including course selections and GPA.
- Identify your target areas within finance as it relates to your career pursuits.
- Pursue opportunities (internship, research, volunteer role) that allow you to develop a relevant skill-set and try out an area of financial services.

ACT

- Update your resume, Handshake account and LinkedIn profile to reflect your experiences and impact.
- Create a career profile with companies of interest in order to stay-up-to-date with recruiting timelines and events.
- Identify specific financial technical skills valued in your desired division and begin to research, study, and practice in order to apply to real-world situations.
- Participate in employer-hosted finance events throughout the year as a means of learning more and developing a relationship with an employer. Info sessions or coffee chats can take place in the fall, winter or spring.
- Apply for opportunities using targeted resumes and cover letters.
- Study, review and practice for various types of interviews (i.e. technical) and formats (phone, virtual, in-person) during the summer and fall quarters in preparation for recruitment.
- Consider your options and finalize your plans for gaining experience during the academic term and summer.

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Junior Year - Your junior year is a time of narrowing your focus and becoming more of an expert within a few areas of financial services in which you have the most interest.

ASSESS

- Reflect on your experiences (academic, organization, internships) and what you learned about the industry and yourself over the course of the last year.
- Examine internship/job descriptions to determine what skills you want to develop or strengthen as a way to better position your candidacy.
- Engage with your career adviser to work on an effective internship search strategy that will showcase your experiences and accomplishments.

EXPLORE

- Identify what skills you want to develop and use in your upcoming internship and consider what job functions prioritize that skillset.
- Connect with your peers to learn about their summer experiences, their employers, and resources they are using to support their search.
- Research a variety of organizations and differentiate between their work specialties and cultures.
- Strengthen your awareness of markets and financial news using resources like: The Wall Street Journal, Morning Brew, Finimize.
- Evaluate internship options and application timelines.

DECIDE

- Determine “must-haves” as they relate to the opportunities you’re exploring.
- Identify employers to pursue for internships based on your understanding of the organization, position function, skillset requirements, and cultural fit.

ACT

- Prepare for various types of interviews questions (behavioral, technical) and formats (phone, video or virtual, in-person).
- Update your resume to reflect new experiences (i.e. internship, leadership and courses), and showcase impact.
- Continue to network with alumni via LinkedIn, Our Northwestern, and the Northwestern Network Mentorship Program.
- Attend career events to make connections and learn more about specific employers.
- Strengthen specific financial technical skills valued in your desired division in order to apply to real-world situations.
- Apply for internship positions using Handshake and employer websites. Apply filters on the Handshake Jobs page in order to help narrow down your search for finance opportunities.
- Coordinate with your faculty member to discuss any potential overlap between finals’ schedules and internship/full-time start dates.
- Develop relationships at your internship site, both within your department and across the organization.

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Senior Year ASSESS

- Reflect on your summer experience and what you learned about the finance industry and yourself.
- Identify what skills you want to use in your full-time job and consider what job functions prioritize that skillset.
- If offered a full-time role, consider the opportunity and assess whether it matches career needs for the future.
- If you don't have a clear career focus, meet with an NCA team member.

EXPLORE

- Expand your knowledge of specific finance opportunities and examine work settings.
- Engage in networking at employer information sessions, coffee chats, career fairs, etc.
- Maintain your network as a means of learning more about the finance industry and potential opportunities.
- Research a variety of organizations and differentiate between their cultures and work specialties.
- Continue to strengthen your awareness of markets and financial news that impact industries/divisions of interest to you via resources like: The Wall Street Journal, Morning Brew, Finimize.
- Connect with your career adviser to evaluate your internship/full-time job options and be realistic about timelines and employers' recruitment processes.

DECIDE

- Identify employers to pursue for full-time jobs based on your understanding of the company, job function, skillset requirements, and cultural fit.
- Activate your network by letting them know you are engaged in a search process – this may be helpful in obtaining more advice and or direct referrals to opportunities.
- Develop a list of alternatives should you need to consider options other than your top-choice career field.
- If applicable, consider a full-time employment offer from your summer internship experience and talk with your career adviser about offer decisions, deadlines and negotiation.

ACT

- Attend career events to make connections and learn more about specific employers.
- Follow up with employer contacts from past career fairs, information sessions, and informational interviews.
- Apply for full-time positions before their deadlines. We encourage you to apply as early as you are ready.
- Strengthen specific financial technical skills valued in your desired division in order to apply to real-world situations.
- Prepare for various types of interviews questions (behavioral, technical) and formats (phone, video or virtual, in-person).
- If you missed the on-campus recruiting cycle, consider applying directly via the companies' websites by creating a career profile and applying to opportunities offered.
- Accept an offer for full-time employment.