



Careers in Banking

Presented by:

Michael Rankin,
Key Resource Advisor, Finance

SFU

BEEDIE SCHOOL
OF BUSINESS
CAREER MANAGEMENT
CENTRE



Agenda



- Banking Career Options
- Major Banking Divisions
- Differences Between Canadian Banks
- Other Options in Finance
- Finance Career Planning
- Fall Campus Recruitment Process
- Finance Recruit Prep Details



Goal 1



Understanding
Banking
Career
Options



How to
Prepare and
Stand Out



Connect!



Set yourself
up for success

Activity 1









- Write down at least 1 job/career path in banking that interests you
- Identify why you are interested in this role/path

Optional (bonus points!):

- *Identify at least 1 company/employer who may hire a BBA graduate in this role/path*

Activity 2: Careers in Banking



Team	Role / Career Path
	?
	?
	?
	?
	?
	?

Activity 2



- Scan through the materials and sample job descriptions for the role / career path
- Note key elements of the role and what employers look for in potential candidates
- Each group will prepare a presentation (max. 5 minutes) regarding the role / career path

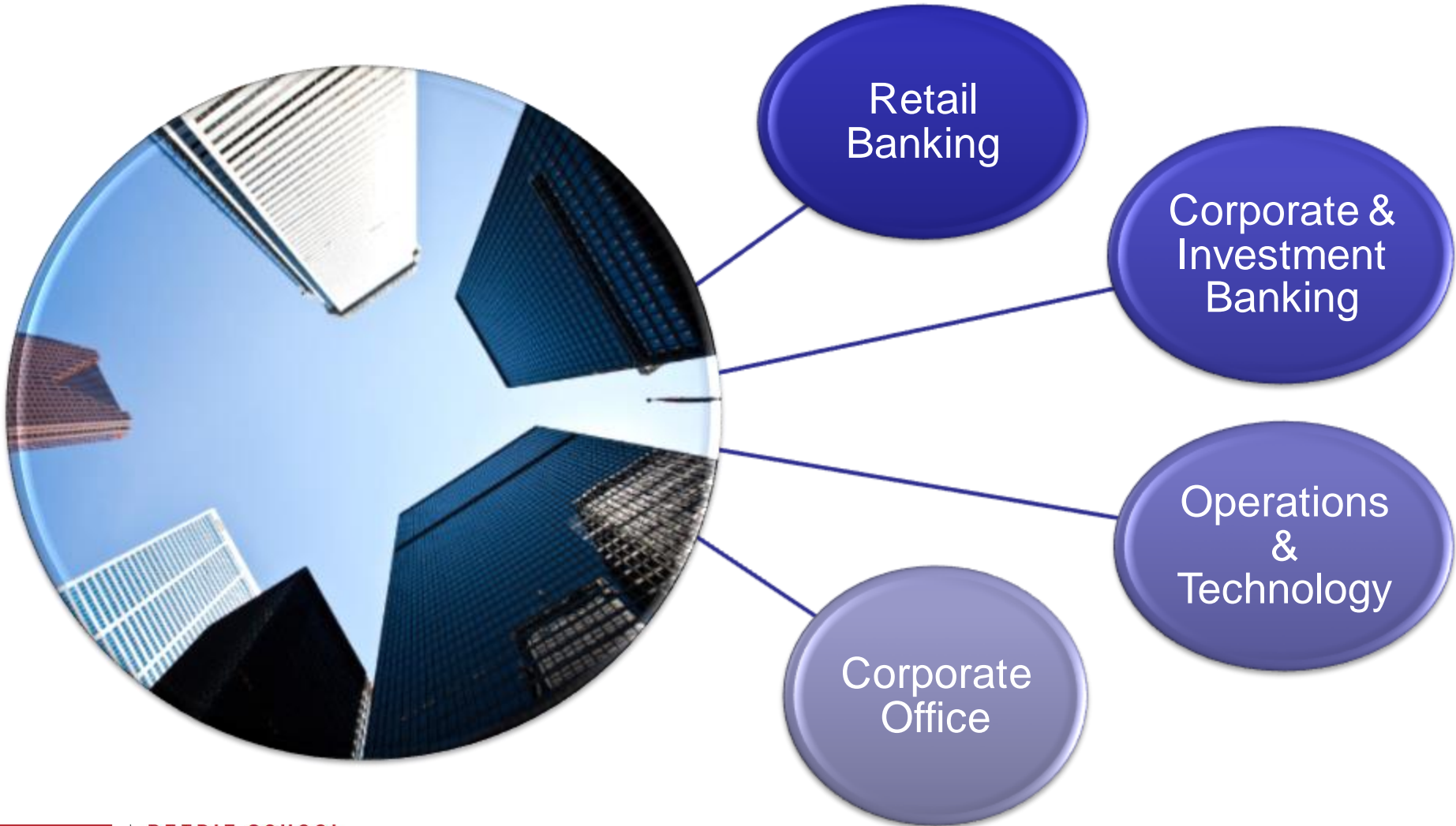
Note: Presentations cannot include the job title nor any other role-specific wording (e.g. “Investment banking/banker”)

Activity 2: Suggested Format



Job Description	<ul style="list-style-type: none">• Overview of role• Typical responsibilities/tasks (“day in the life” of...)
Desired Skills + Experience	<ul style="list-style-type: none">• What are the required (“must have”) skills?• What are other desirable (“nice to have”) skills that may appear on an employer’s “wish list”?
Optional	<ul style="list-style-type: none">• What is the selection process: do they actively recruit or is this based on networking / referrals / “leads”?• What does the interview process entail? What styles of interviews are used (behavioural, technical, panel?)• What are the employment options like in Vancouver?

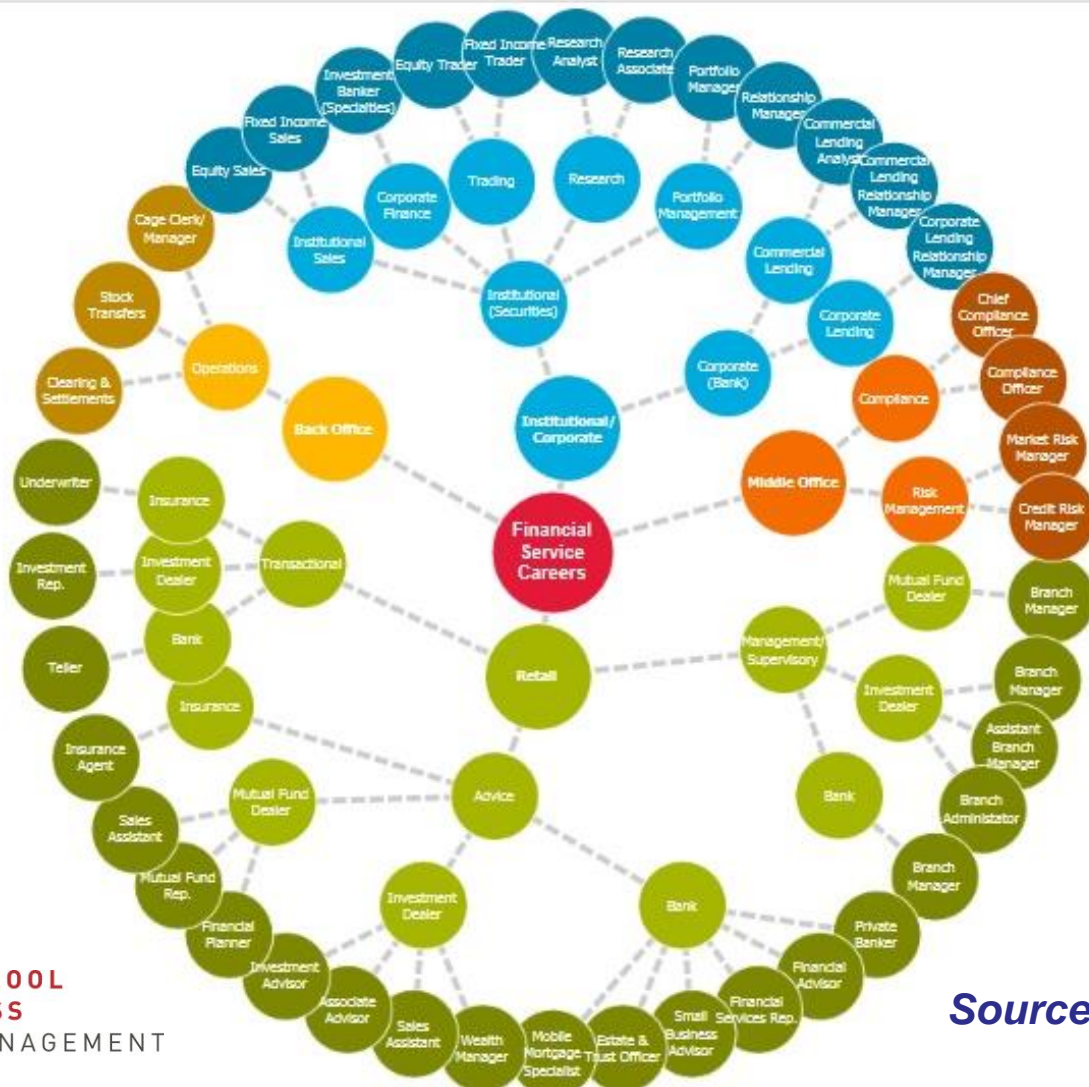
Banking Divisions



Banking Careers Map



View careers by sector: Retail Back Office Institutional / Corporate Middle Office



Retail Banking



Consumer/Personal Banking

Wealth Management/Private Banking

Small Business Banking

Brokerage

Commercial Banking



Career Options - Retail Banking



Teller/Financial
Services
Representative

Personal
Banker

Financial
Advisor

Branch
Manager

Private
Banking
Assistant

Mortgage
Specialist

Commercial
Account
Manager

Investment
Representative

Fraud Analyst

Portfolio
Analyst

Underwriter

CSI Career Map



Contains useful information for specific roles:

- Job Description
- Required Skills
- Earnings Potential
- Required Credentials and Certifications (usually offered by CSI)



Financial Services Career Map

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Small Business Advisor

The Small Business Advisor's job is to meet the total banking needs of small business owners. The Advisor is responsible for the sales of small business financing solutions to businesses and to business owners, as well as providing solutions to business owners for their personal financial needs. They are fully familiar with financial statement analysis and understand the meaning of financial ratios and their relevance to the small business operation.

Responsibilities include:

- Designing/originating small business loans and lines of credit
- Researching the business client, competitive environment and potential challenges of the business operation
- Evaluating the credit request and analyzes risk and return factors
- Networking within the local business community to build referrals

Alternate Name

Financial Advisor Business, Small Business Banker

Earning Potential

\$55,000-\$75,000/year

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[Return To Full Map](#)

Required & Recommended CSI Credentials and Courses

Below are the CSI courses and credentials required and/or recommended for this career.

Certificate in Small Business Advisory



Corporate & Investment Banking



Front Office

- Corporate Finance, M&A
- Sales & Trading (Derivatives, Fixed Income, Equities, etc.)
- Research
- Transaction Services (cash management, hedge funds, etc.)

Middle Office

- Treasury
- Risk & Compliance
- Financial Control

Back Office

- Operations
- Technology

Career Options - Corp & Invest Banking



Investment
Banking
Analyst

Research
Associate

Analytics
Analyst

Treasury
Analyst

Cash
Management
Specialist

Risk Analyst

Compliance
Analyst

Financial
Analyst

Operations
Specialist

Derivatives
Trader

Corporate
Banking
Analyst

Operations & Technology



Programmer/Developer

Securities Processing
Representative

Business Analyst

Quality Assurance
Analyst

Corporate Office



What's the difference?



Other Financial Institutions



Credit Unions

- Vancity
- ATB Financial
- Coast Capital Savings

Domestic

- National Bank
- Canadian Western Bank
- Laurentian Bank

Foreign Subsidiaries

- HSBC
- Bank of America
- Citi
- ICICI Bank
- Société Générale
- Goldman Sachs
- UBS

Global

- Deutsche Bank
- BNP Paribas
- Royal Bank of Scotland
- Barclays
- Credit Suisse
- Morgan Stanley

Other Options



Investment Firms

- Phillips, Hager & North
- Raymond James
- Connor, Clark & Lunn

Pension Funds

- bcIMC
- AIMCo

Private Equity / Venture Capital

- Beedie Capital Partners
- CAI
- Growth Works
- Kensington Capital Partners

Insurance

- Intact
- The Co-Operators
- Chubb

Government- owned/Affiliated

- Bank of Canada
- Business Development Bank of Canada
- Export Development Canada

Activity 3



- Review the “Finance Career Planning Grid”
- Recall your preferred role(s) from Activity 1 and discuss with other students in your group
- Go to the designated letter (A, B, C, or D) that you feel best describes your role/path
- Reveal & debrief

Finance Career Planning Grid



Transaction Frequency

		A	Lower	Higher	B
		Client Focus	External	Finding Businesses to Value and/or Manage	
Internal	Finding Business Processes to Improve			Finding Trading or Investing Opportunities	
		C			D

Job Possibilities



Transaction Frequency

Lower

Higher

Client Focus

External
Internal

Investment Banking Financial/Corporate Restructuring Venture Capital Private Equity	Institutional Sales Private Banking Commercial Banking Corporate Banking
Corporate Finance Strategic Planning Internal Audit	Asset Management Securities Research Trading Risk Management Treasury



Goal 2



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Fall Campus Recruiting



Employer	Date
RBC (“Time 4U”) Sessions <i>(contact Preet at CMC for details)</i>	Wednesday August 20
Telus (Financial Management Development Program - FMDP)	Thursday August 28
CIBC	Monday September 8 (at UBC)
BMO	Wednesday September 10
Fidelity Investments	Wednesday September 17

****Additional sessions may be added; please continue to check the “Events” Calendar on Beedie Community for details.***



Finance Recruit 2014



Recruiting Events

- Registration will open in coming weeks; join “Finance Recruit” subscription on Beedie Community for notification.
- Details on target audience will be provided – read carefully!

Job Postings

- Watch Beedie Community job board
- Deadlines are not flexible!
- Applications include cover letter, resume, unofficial transcripts

The Opportunities



Rotational Programs

- Wealth Management
- Capital Markets
- Management Trainee
- Leadership

Full-time positions (upon graduation)

- Investment Banking Analyst
- Technology Solutions Associate
- Sales & Trading Associate
- Commercial Banking Associate

Summer Internships

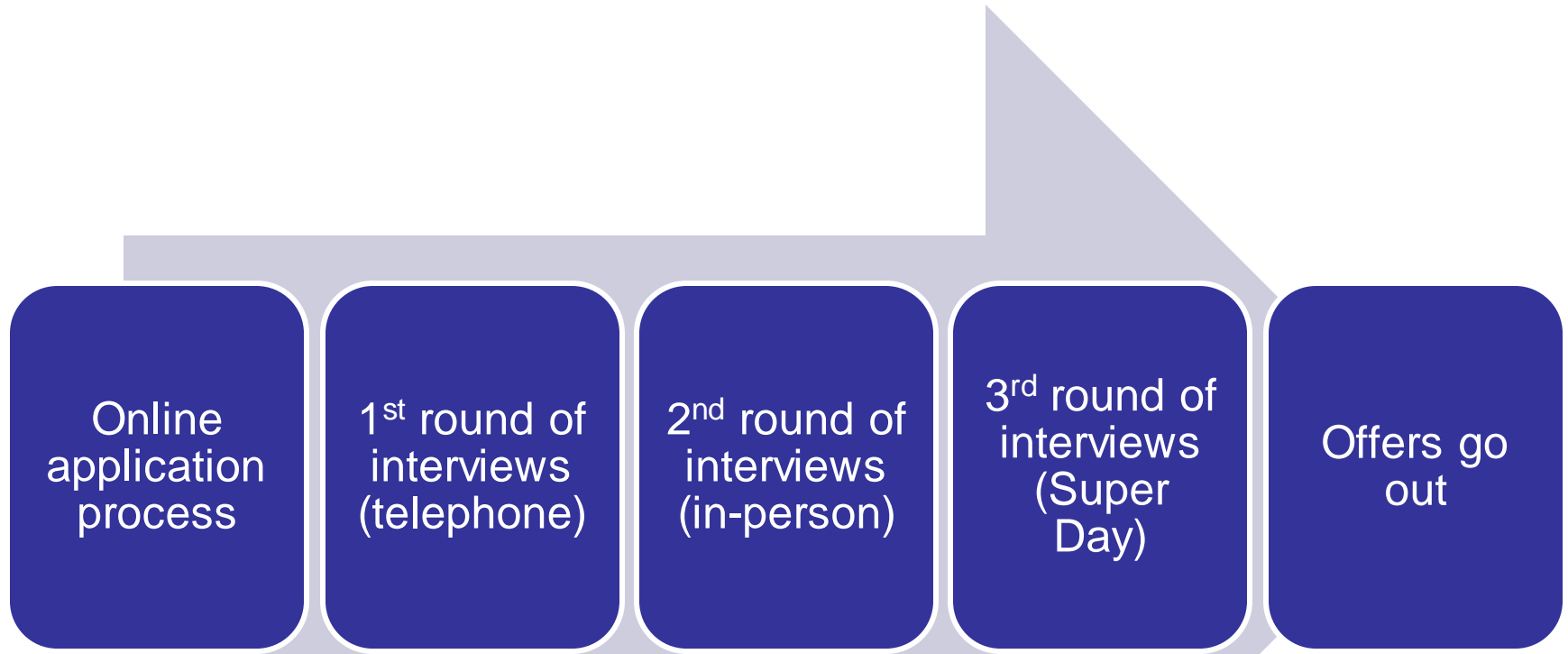
Beedie Community: Jobs



Job ID	Position	Organization
7685	Financial Advisor	Sun Life Financial
7774	Client Service and Sales (Japanese Speaker - Fall 2014)	Bloomberg
7808	Product Analyst	First West Credit Union
7830	Financial Security Advisor	Freedom 55 Financial
7862	Investment Analyst	Jiacheng Overseas Immigration and Education Corp
7863	Financial Analyst, Budgets	BC Public Service Agency
7872	Manager, Financial Planning and Analysis	BCLC
7875	Portfolio Administrator	Connor, Clark & Lunn Financial Group
7917	Financial Security Advisor	Freedom 55 Financial
7926	Director of Finance	RainCity Housing and Support Society
7937	Financial Analyst	York HR Solutions Inc
7947	Analyst, Investment & Corporate Banking	BMO Financial Group
6731	Director, Compliance	ZSA-X Financial Services Recruitment



Recruitment Process



Refer to Finance Recruit bookmark for important interview dates!

What they look for....



- Interest in financial services
- Knowledge of financial products/services
- Team player
- Problem solving ability
- Time management skills
- Communication skills (verbal and written)
- Customer service oriented
- Leadership skills
- Influencing ability
- Ability to work in an ambiguous/changing environment
- Related designations/certifications

How do I prepare?



- Do your research
 - Industry
 - Companies
 - Jobs
 - Yourself!
- Look the part
 - Buy a suit
 - Get a hair-cut
- Participate in Finance Recruit Prep
- Develop your cover letter, resume and networking skills
- Know what's happening in the financial markets!



Resources



Beedie Resources:

- Career Leader (Self-Assessment Tool)
- Sokanu (Self-Assessment Tool)
- Strengths Finder (Self-Assessment Tool)
- Careers in Business Guide
- Career Insider “Vault” Guides
- “Breaking into Wall St” Guides
- Other Finance-related resources



Additional Resources



- LinkedIn
- Industry Associations
- Business publications
 - Wall Street Journal
 - Globe & Mail Report on Business
 - Financial Times
 - Business in Vancouver
 - Economist
- Business / Financial Journals



► biv.com





Goal 3



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Connect!



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Take-Home Activity: Research Using LinkedIn



- Identify 2 to 4 people who are in a role or with an employer that you're interested in
- *Hint:* If you're not sure where to start, try searching for Beedie alumni
- See what kinds of activities and experiences they did through university
- Considering adding to your Action Plan
- Reach out & connect...Build your Network!

CareerTalk



Commercial
Banking

- Senior Manager –
Diversified Banking

Investment
Management

- Associate Portfolio Manger

Wealth
Management

- Associate Advisor

Investment
Banking

- Analyst (Mining)





Goal 4



Understanding
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How to
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Connect!



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Finance Recruit Prep Program



Think. Pair. Share.



Brainstorm 4 ways you can learn more about careers in banking

(Bonus points if you can think of something that involves face-to-face communication)

Activity:

Your Action Plan



- On your own, brainstorm 3 specific things you can do to be better equipped for your career of interest.



Questions?



Career Management Centre (CMC)

Location: WMC 2329
Email: bbacareers@sfu.ca
Phone: 778.782.9471
Web: beedie.sfu.ca/careers

Beedie Community:

beediecommunity.sfu.ca

