

# Finance Emphasis Guide

## Career Guide

### EXPLORE

The finance program is designed to provide students with in-depth knowledge and skills necessary for entry-level positions in the financial services industry, including career paths in corporate and public finance, banking, and personal and institutional wealth management. Students study foundational concepts in accounting, financial analysis, financial reporting, and macroeconomics as well as specialized areas including mergers and acquisitions, valuation, entrepreneurship, derivative securities, and foreign exchange markets. Students also benefit from access to the Burridge Center for Finance and Michael A. Klump Center for Real Estate as well as numerous student-run clubs.

### Industry Overview

**Corporate Finance:** Positions include financial planning and analysis (FP&A), treasury, corporate development, risk management, corporate real estate, and investor relations. These roles are found in private and publicly traded businesses of all sizes, state and local governments, federal agencies, nonprofits, and foundations.

**Banking-Retail or Commercial:** Positions include credit analysis, commercial and industrial lending, mortgage lending, loan origination and packaging, branch management, operations, cash management, risk management, financial analysis, private banking, and banking regulatory examiners. These roles are found in commercial banks, private banks, credit unions, savings banks, mortgage banks, and regulatory agencies.

**Investment Banking:** Positions are broken into Product Groups (Mergers & Acquisitions (M&A), Debt Capital Markets, Equity Capital Markets, Leveraged Finance, and Corporate Restructuring) and Coverage Groups (Industrial, Healthcare, Financial Institutions Group (FIG), Oil & Gas, and Real Estate). These roles are found in bulge bracket banks, regional banks, and smaller boutiques.

**Wealth Management & Personal Financial Planning:** Positions include sales, customer services, operations, portfolio management, financial advising, and insurance advising. These roles are found in brokerage firms, trust companies, financial partnerships, multi-line insurance firms, and sole practitioner operations.

**Institutional Asset Management:** Positions include equity and fixed income research, equity and fixed income trading, asset allocation, and portfolio management. These roles are found in pension funds, mutual funds, hedge funds, wealth management firms, and insurance companies.

### Additional Tips

#### Get Involved

- Beta Alpha Psi
- Boulder Venture Club
- CU Real Estate Club
- CU Investment Banking Club
- CU Quants
- Financial Planning Club
- Leeds Investment and Trading Group
- Scholars of Finance
- Women in Finance

#### Events & Networking

- Attend Meet the Firms, Career Fairs, and Networking Events
- Attend Career Exploration, Instant Interviews and Trek Events

#### Skills Employers Notice

- Advanced Excel/Financial Modeling
- Programming Languages (Python, SQL, etc.)
- Critical Thinking and Communications

### Recruiting Timeline

#### ► Fall Semester

- Large Corporations
- Large Wealth Management Firms
- Institutional Asset Management Firms
- Commercial Banks
- Regional Investment Banks

#### ► Spring Semester

- Regional and Local Companies
- Small Wealth Management Firms
- Investment Banks

*(interviews for Junior-year summer semester internships occur during Sophomore-year spring and summer semesters)*

### Resources

Resume and Cover Letter Templates on [leeds.ly/CareerRoundup](https://leeds.ly/CareerRoundup)  
Make an appointment with your Industry Coach today at [leeds.ly/careeradv](https://leeds.ly/careeradv)  
Stay up to date on jobs and events at [leeds.ly/Handshake](https://leeds.ly/Handshake)

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## Academic Guide

### REQUIRED COURSES

**FNCE 2010:**

Fundamentals of Financial Analysis

*\*taken during 2nd year with BASE*

**FNCE 3010:**

Corporate Finance

*\*requires prerequisite or corequisite of BASE 2104*

**FNCE 3030:**

Investment and Portfolio Management

*\*requires prerequisite of BASE 2104 and FNCE 2010.*

**ACCT 3220:**

Corporate Financial Reporting 1

*\*requires prerequisite of BASE 2104*

**FNCE 4040:**

Derivative Securities

*\*requires prerequisite of FNCE 3010*

**FNCE 4850:**

Senior Seminar in Finance

*\*requires prerequisites of ACCT 3220, FNCE 3010, and FNCE 3030*

### QUICK REMINDERS

- ▶ Students must complete all **BCOR** and **BASE** classes to enroll in any Area of Emphasis classes except FNCE 2010.
- ▶ The **Finance Area of Emphasis** takes 3 semesters to complete for a total of **18 credit hours**.
- ▶ The **Personal Financial Planning** track generally takes **4 semesters**, for a total of **27 credit hours**. It qualifies students to sit for the **CFP certification exam**.
- ▶ All courses are **3 credit hours** unless otherwise noted.



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### Optional Finance Focuses

The required courses represent a minimum requirement for competence in financial analysis and decision-making. Combinations of the upper division elective finance courses allow students to structure their learning in preparation for specific career paths.

**Investment Banking Focus:**

ACCT 3230: Corporate Financial Reporting 2  
FNCE 4050: Capital Investment Analysis (Fall only)  
FNCE 4830: Seminar in Investment Banking (Spring only)

**Investment Management Focus:**

FNCE 4050: Capital Investment Analysis (Fall only)  
MSBX 5225: Advanced Portfolio Management  
MSBX 5260: Fixed Income Investing

**Commercial Banking Focus:**

FNCE 4070: Financial Markets and Institutions  
MSBX 5260: Fixed Income Investing

**Corporate Finance/Consulting Focus:**

ACCT 3230: Corporate Financial Reporting 2  
FNCE 4050: Capital Investment Analysis (Fall)  
ESBM 4570: Entrepreneurial Finance

**Entrepreneurial Finance Focus:**

ESBM 4570: Entrepreneurial Finance  
INBU 4200: International Financial Management