

Finance - Investments

Working in the world of securities and investments can be a very lucrative career path. Those wanting to pursue this industry will often find themselves in positions analyzing securities and investment options and making recommendations on which option to pursue. Those typically working in securities and investments often have a degree in business, accounting, or finance. Most investment banks and firms are located in major financial centers across the United States and around the world including New York, San Francisco, Hong Kong and London. Two common tracks within this industry are Investment Banking and Asset Management.

Investment banks specialize in calculating what a business is worth, usually for one of two purposes: to price a securities offering or to set the value of a merger or acquisition. Securities include stocks and bonds, and a stock offering may be an initial public offering (IPO) or any subsequent (or "secondary") offering.

Asset management companies manage their clients' money to achieve specific financial objectives within guidelines under which the investment pool is organized. The pool might take the form of a mutual fund, hedge fund, retirement or pension fund, or other institutional fund and, depending on how the fund is organized, could invest in a range of investment vehicles including equities, fixed-income securities, and derivative products such as options and futures.



Source: Wetfeet Investment Banking;
Wetfeet Asset Management

Average Salary & Trajectory*

Entry-Level

\$60,000 annually

- Jr. Financial Analyst
- Wealth Advisor Associate
- Equity Analyst
- Investment Specialist
- Equity Research Analyst

Mid-Level

\$76,000 annually

- Fixed Income Portfolio Manager
- Portfolio Manager
- Senior Investment Analyst
- Equity Research Associate

Executive-Level

\$157,000 annually

- Managing Director
- VP of Investment
- VP of Investment Analysis
- VP of Fixed Income
- Fixed Income Director

Learn More With O*Net

Visit O*Net OnLine to explore the sample roles in investments. The database provides career exploration tools to the public at no cost and is continually updated by surveying a broad range of workers from each occupation. Learn about the knowledge, skills, tasks, and activities required for each occupation, as well as median wages and employment trends reported by the Bureau of Labor Statistics and other federal agencies.

01 Visit O*Net OnLine at www.onetonline.org

02 Refer to the sample job titles listed in the "O*Net Keywords" section below

03 Enter phrase into O*Net's "Occupation Search" to explore sample roles

O*Net Keywords:

- Equity
- Investment
- Securities
- Commodities

Roles:

- Sales Agents
- Financial Analyst
- Personal Financial Advisors

*Note: Salaries are highly dependent on location, company type, and candidate experience/education. For the purposes of this guide we are providing average starting salaries as determined by the National Association of Colleges and Employers (NACE), overall average salaries as determined by the U.S Bureau of Labor Statistics (BLS), as well as supplemental information found from various industry-specific sources.

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Skills/Experience Suggested:

- Knowledge and interest of capital markets and investments
- Confidence to communicate financial theories effectively
- Considering costs and benefits of potential actions to choose the most appropriate one
- Ability to work with high-level, busy professionals in a fast-paced team environment
- Excellent verbal, written, analytical and organizational skills
- Ability to sell through others and high-energy personality to deliver results, both in terms of the quality and quantity of revenues

Professional Certifications:

- Chartered Financial Analyst (CFA)
- Certified Investment Management Analyst (CIMA)

Professional Associations:

- Association for Financial Professionals
- National Organization of Investment Professionals

Campus Resources:

- Finance Association
- Applied Securities and Analysis Program (ASAP)
- Student Managed Investment Fund (SMIF)
- Business Finance Alumni Chapter

Don't forget to check out the list of career path advisors

business.fullerton.edu/Programs/Undergraduate/#career-path-advisors

Industry Research & Tools:

- Financial Times
- Wall Street Journal
- Investopedia.com
- Wetfeet.com/articles/career-overview/asset/management
- Schools.wetfeet.com/careers-industries/careers/investment-banking
- Vault.com— accessible through your Student Portal

Job & Internship Search Sites:

- Efinancialcareers.com
- Quantfinancejobs.com
- Fins.com
- Indeed.com
- Internships.com
- LinkedIn.com
- Vault.com (Investment Management) — accessible through your Student Portal

Employers Hiring Mihaylo Graduates:



CALIFORNIA
CAPITAL & INVESTMENT
GROUP



FIDELITY
BANCORP FUNDING



STATE STREET



UnionBank



Westlake Financial Services*