

# Four-Year Roadmap: Finance

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**Major:** It is recommended that students major in Economics or Quantitative Economics with a Finance Emphasis.

**Technology Recommendation:** PC-based computers are the standard for careers in finance.

**Early Recruiting:** Many employers in finance recruit early! You may need to apply for junior internships (i.e. the summer after your junior year) during the beginning of your sophomore spring semester. This means you need to be engaged right away in your first year to prepare.

## Finance Fast Track Early Course & Opportunity Progression

Semester 1 (Fall)		Semester 2 (Spring)		Semester 3 (Fall)		Semester 4 (Spring)
Principles of Economics (ECON 121)		Principles of Accounting (BUS 225)		Corporate Finance (BUS 281)		Investments (BUS 380)
				Managerial Accounting (BUS 237)	O R	Managerial Accounting (BUS 237)
		Intro to Econometrics (ECON 260)	O R	Intro to Econometrics (ECON 260)		
New York or Chicago Connections		Wall Street Prep (summer)		New York or Chicago Connections		Wall Street Prep (review)
Finance Exploration and Research: Where is my fit? Informational Interviews/Shadowing/Follow Markets				Summer Internships		

## Resources & Tools

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- [Finance Career Map](#)
- [Planning your Economics Major](#)
- [Area of Emphasis in Finance](#)
- [Piper Center Website](#) ([Business](#)) ([Accounting & Finance](#)) ([Investments & Capital Markets](#))

## Events

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- [Fall On-Campus Recruiting](#)
- [Fall Recruiting Showcase](#)
- [Ole Biz](#)
- [Minnesota Private Colleges' Job and Internship Fair](#)
- [Chicago or NYC Connections Program](#)

# First Year

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## Curricular

Fall Semester	Spring Semester
ECON 121 (Principles of Economics) **	BUS 225 (Principles of Accounting) ECON 260 (Intro to Econometrics) ***
<p>** Students who join the FFT Opportunity in the fall may take ECON 121 over j-term or spring.</p> <p>*** ECON 260 can also be taken in the fall semester of sophomore year.</p>	

## Co-Curricular

1. Join the St. Olaf Investment and/or Finance Club. Consider other clubs and programs that align with your interests.
2. Begin reading financial publications (Wall Street Journal, Financial Times, etc.)
3. Participate in the Wall Street Prep Financial Modeling Training (Ole Career Launcher Program - applications open in spring semester and program is opened to students in May for summer.)

## Career

1. Meet with a Piper Center Business Coach
2. Complete a resume and LinkedIn profile by the end of the first semester.
3. Key question to investigate: Where is my fit (i.e. role/functional area) in the world of Finance?
  - o Spend time researching different functional areas within finance. Which areas spark your curiosity? Which areas seem to align with your strengths, interests, and goals?
4. Network with 4-5 five alumni working in a broad range of finance roles (the best way to learn about an industry is to speak with someone currently working in it); use the alumni database and LinkedIn to locate alumni.
5. Attend employer info sessions - some are arranged by the Piper Center but many are hosted by the employers virtually (lots of options in Handshake events!) Attendance at info sessions IS strongly encouraged by employers and can make the difference in landing an interview.
6. Formal summer internships after your first-year are not common and not always necessary; informal opportunities can materialize through conversations with connections.
7. Many firms offer first-year/freshman programs, especially for students who are part of traditionally underrepresented populations.
8. Attend the Fall Recruiting Showcase to connect with firms - you won't be eligible for internships yet, but this is a great way to learn about the employer landscape and what employers seek. Attend Ole Biz.
9. Participate in the Chicago or New York Connections Program (if offered this year.)

## Reading

1. Some students may benefit from reading the following: Venture Capital, Private Equity and Investment Banking [reading list](#).
2. All students should develop a daily and weekly practice of following the markets through key news sources. (Online publications, favorite and follow relevant companies/publications/organizations using LinkedIn.

# Sophomore Year

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## Curricular

Fall Semester	Spring Semester
BUS 281 (Corporate Finance) BUS 237 (Managerial Accounting) **	MGMT 380 (Investments) BUS 237 (Managerial Accounting) **
** BUS 237 (Managerial Accounting) can be taken in either semester. Recommended to complete Micro- or Macroeconomics, Math sequence through Linear Algebra	

## Co-Curricular (Co-curricular and leadership opportunities are important for finance employers.)

1. Look for jobs on campus that will complement your education and career search (i.e., Supplemental Instructor, Teachers' Assistant, job in the Business Office or Financial Aid, etc.)
2. Look for opportunities to become a leader in clubs and programs that align with your interests (e.g. Treasurer roles, CFO of The Pause, etc.)
3. Review content in Wall Street Prep to prepare for interviews in the spring semester.
4. Participate in the Chicago or New York Connections Program (if offered this year.)

## Career Activities

1. In August or early September meet with a business career coach in the Piper Center to develop a recruiting strategy.
2. Recruiting Timeline:
  - o Sophomore Fall: Some summer internships will be open to you right away in the fall - be ready! Most sophomores may need to wait until spring recruiting starts (January-March).
  - o Sophomore Spring: Junior summer internship recruiting opens in late January-early March – yes, 15 months early! This is an important internship because employers like to convert interns into full-time offers for after graduation.
  - o Unfortunately, you may be applying for internships for your sophomore and junior summers at the same time.
3. Attend employer info sessions - some are arranged by the Piper Center, but many are hosted directly by the employers virtually (lots of options in Handshake events!) Attendance at info sessions IS valued by employers and they often prioritize candidates who attended their events – it can make the difference in securing an interview.
4. Attend the Fall Recruiting Showcase to learn about firms that recruit at St. Olaf, especially those that may recruit sophomores. Attend Ole Biz.
5. If needed, attend the Minnesota Private Colleges' Job and Internship Fair in February.
6. Women-identified and non-binary students should consider the [Girls Who Invest Program](#). Applications typically open in August prior to sophomore year.
7. Many firms offer sophomore leadership programs, especially for students who are part of traditionally underrepresented populations in the finance industry.
8. Continue to network with alumni and narrow the focus to a group of finance areas that you are especially interested in; also target alumni outreach in your preferred locations (e.g., Minneapolis-St. Paul, New York, Chicago, San Francisco)

## Reading

1. If relevant for you, consider reading *Investment Banking* by Rosenbaum and Pearl
2. Choose a few books from the Venture Capital, Private Equity and Investment Banking [reading list](#).

# Junior Year

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## Curricular

1. Continue with Economics/Quantitative Economics courses
2. Math: Consider completing Modern Computational Math, Real Analysis, Abstract Algebra, Statistical Modeling or Probability Theory
3. Other: Complete Statistical Modeling and complete Operations Research or Mathematics of Finance (prerequisites are Calc II and Linear Algebra)

## Co-Curricular

1. Continue with leadership opportunities through campus work and organizations.

## Career

1. Attend the Fall Recruiting Showcase. Attend Ole Biz.
2. Participate in fall recruiting to apply for internships if you are still seeking.
3. If needed, attend the Minnesota Private Colleges' Job and Internship Fair in February.
4. Continue networking and building connections with alumni or other contacts in the field with additional focus on your desired industry, functional area, and/or geography.

## Reading

1. Choose a few books from the Venture Capital, Private Equity and Investment Banking [reading list](#).

# Senior Year

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## Curricular

1. Continue with Economics/Quantitative Economics courses.
  - o Suggested Upper-Level Courses: Money and Banking, International Economics, Econometrics: Time Series and Forecasting, Econometrics: Cross-Sectional and Panel Data, Network Economics, Economics of Health Care
2. Consider additional courses from Business & Management Studies or Statistics and Data Science

## Co-Curricular

1. Continue to look for leadership opportunities through campus work and organizations.

## Career

1. Search for a job by converting your summer internship to full-time (i.e., a return offer) or through Fall recruiting. Some finance positions will be available in the spring semester but students should be ready to engage right away in the fall to access all options.
2. Networking is key! Begin networking with a long-term focus; speak with individuals who are doing interesting work and who may be a potential employer in the future.
3. Consider sitting for CFA, CFP, or securities series exams, as applicable.
4. If business school is in your future, you can consider taking the GMAT exam too.

## Reading

1. Choose books from the Venture Capital, Private Equity and Investment Banking [reading lists](#).

## A Note for International Students

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Finance can be a challenging career path for international students who are seeking to work in the United States during or after your time at St. Olaf. Most U.S. financial firms limit internship and job opportunities to candidates who are U.S. Citizens or Permanent Residents. The Piper Center will do everything we can to support and assist you, but it will be challenging to secure internships and jobs in this field. We strongly encourage students to pursue a secondary career path and/or consider opportunities in their home or third country. In addition to corporate career sites, [Handshake](#) and [GoinGlobal](#) are good resources to search for global job and internship postings.