

Finance - Investments

Working in the world of securities and investments can be a very lucrative career path. Those wanting to pursue this industry often secure 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: Career Overview—Insurance

Average Salary & Trajectory*

Entry-Level

\$72,000 annually

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

Mid-Level

\$101,000 annually

- Investment Analyst
- Equity Research Associate
- Fixed Income Portfolio Manager
- Trader
- Managing Director

Senior-Level

\$123,000 annually

- Sr. Investment Manager
- Fixed Income Director
- Compliance Analyst
- Operations Manager
- Capital Markets Director
- Sr. Managing 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.

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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
- 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
- Interpersonal communication and teamwork skills
- Proficiency using Excel and spreadsheets

Professional Certifications:

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

Professional Associations:

- Association for Financial Professionals
- National Organization of Investment Professionals
- Finance Association

Campus Resources:

- Titan Capital Management Program (TCM)
- Finance Association
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Industry Research & Tools:

- Financial Times (ft.com)
- Wall Street Journal (wsj.com)
- Investopedia.com
- Fullerton.firsthand.co – Login with your CSUF email

Job & Internship Search Sites:

- Efinancialcareers.com
- Fullerton.joinhandshake.com
- Indeed.com
- Internships.com
- LinkedIn.com
- Titan Connection

Employers Hiring CSUF Business Graduates:



**California Commercial
 Investment Group, Inc.**

Morgan Stanley



PACIFIC LIFE

**Green Street
 Advisors**



STATE STREET

**Edward
 Jones**



Ameritrade