

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.



Average Salary & Trajectory*

Entry-Level

\$85,000 annually

- Investment Analyst
- Equity Research Associate
- Financial Analyst (Investment Focus)
- Portfolio Analyst / Assistant PM
- Wealth Management Analyst
- Investment Banking Analyst

Mid-Level

\$121,000 annually

- Investment Analyst (Mid-Level)
- Associate Portfolio Manager
- Equity Research Analyst (Sell-Side)
- Buy/Side Analyst (Hedge Fund/Asset Manager)
- Wealth Advisor / Relationship Manager
- Investment Banking Associate

Senior-Level

\$316,000 annually

- Senior Portfolio Manager
- Director of Investments
- Investment Banking VP / Director
- Senior Equity Analyst
- Chief Investment Officer (CIO)
- Hedge Fund Manager / Partner

Learn More With O*Net

Visit O*Net Online to explore the sample roles in entertainment and hospitality. 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:

- Investment Analyst
- Compliance Officer
- Credit Analyst
- Financial Examiner
- Private Banker

Roles:

- Investment Fund Manager
- Personal Financial Advisor
- Credit Analyst
- Treasurers and Controllers
- Market Research Analyst

Finance – Investment

Skills/Experience Suggested:

- Financial modeling, data analysis, forecasting
- Excel, Bloomberg, Morningstar, FactSet, Python
- Writing investment reports, presenting finds, advising clients
- Market analysis, economic trend evaluation, sector-specific insights
- Accuracy in financial calculations, compliance checks, risk management
- Evaluating risk-return trade-offs, making portfolio or trade recommendations
- Working with analysts, portfolio managers, or advisory teams
- Internships - Investment banking, asset management, wealth advisory, equity research
- Student Investment Clubs – Participating in or managing student-run portfolios in finance competitions
- Professional Networking – Attending CFA Society events, finance career fairs, or alumni panels

Professional Certifications:

- CFA (Chartered Financial Analyst)
- CFP (Certified Financial Planner)
- CAIA (Chartered Alternative Investment Analyst)
- FRM (Financial Risk Manager)
- CIMA (Certified Investment Management Analyst)

Professional Associations:

- CFA Institute
- Global Association of Risk Professionals (GARP)
- Chartered Alternative Investment Analyst Association
- Investments & Wealth Institute
- Financial Planning Association (FPA)
- Securities Industry and Financial Markets Association
- Association for Financial Professionals

Campus Resources:

- Titian Capital Management Program (TCM)
- Finance Association

Industry Research & Tools:

- [Bloomberg Terminal](#)
- [Morningstar Direct](#)
- [FactSet](#)
- [PitchBook](#)
- [S&P Capital IQ](#)
- [EDGAR \(SEC.gov\)](#)
- [Wall Street Journal & Financial Times](#)
- [FRED \(Federal Reserve Economic Data\)](#)
- [Trading View](#)

Job & Internship Search Sites:

- [EFinancialCareers](#)
- [Wall Street Oasis \(WSO\)](#)
- [Handshake](#)
- [College Recruiter](#)
- [LinkedIn.com](#)
- [Titan Connection](#)

Employers Hiring CSUF Business Graduates:



California Commercial
Investment Group, Inc.

Morgan Stanley



PACIFIC LIFE



STATE STREET



Ameritrade