Welcome Day
Department of Accounting and Finance

Finance Program

April 18, 2020
Finance Program

Prepare students to become a Portfolio Manager, Financial Analysts, Financial Planners, and other careers in the finance industries.
Finance Program

Prepare students to work in

Banks
Financial Institutions
Government Agencies
BSBA
Finance Concentration
Business Core Courses

Lower Division Core Courses – 18 units

• ACCT 210 - Introduction to Financial Accounting
• ACCT 215 - Introduction to Managerial Accounting
• ECON 200 - Principles of Microeconomics
• ECON 205 - Principles of Macroeconomics
• MATH 180 - Mathematics for Business with Calculus
• STAT 110 - Elements of Statistics for Business and Economics
Business Core Courses

Upper Division Core Courses - 27 units

- BUS 310 - Organizational Behavior
- BUS 325 - Marketing Principles
- BUS 330 - Financial Management
- BUS 335 - Communications in Team Building
- BUS 360 - Operations Management
- BUS 499 - Seminar in Strategic Business Management
- ECON 380 - Managerial Economics and Business Strategy
- MGMT 350 - Decision Science
- BUS 385 - International Business Units: 3 OR
- ECON 385 - Global Economic Analysis
Finance Concentration

The following 18 units are required:

**BUS 220 - Legal Environment of Business**
**BUS 320 - Business and Professional Ethics**
**BUS 340 - Information Technology Management**
**BUS 370 - Business, Government and Society**
**FIN 405 - Corporate Finance**
**FIN 420 - Investment Analysis**

Elective Course – 3 units (one of the following)

**Select four (4) courses for 12 units from the list below:**

**FIN 410 - Problems in Corporate Finance**
**FIN 430 - Derivatives Markets**
**FIN 435 - Risk Management in Financial Institutions**
**FIN 445 - Financial Modeling**
**FIN 497 - Seminar in Financial Theory**
**FIN 460 - International Business Finance**
**FIN 470 - Entrepreneurial Finance**
**FIN 475 - Advanced Investment Analysis and Ethics**
**FIN 480 - Real Estate Finance**
Finance
Career Opportunities
Career Opportunities

1. Portfolio Manager –
   Manage investments in different asset classes

2. Financial Planner –
   Provide retirement advice to individuals

3. Analyst –
   Prepare valuations for different assets in the market
Opportunities in Large Corporations

1. Banks
   - Chase
   - Wells Fargo
   - Bank of America
   - Citi Bank

2. Investment Firms
   - Goldman Sachs
   - Vanguard
   - Charles Schwab
   - Merrill Lynch

3. Private Equity Firms
   - Blackstone
   - KKR
   - Apollo

4. Others: e.g., hedge funds, REITs, etc.
Finance Career in Government

1. Federal government agencies
   1. Department of Treasury – Office of the Comptroller and Currency (OCC) - National Bank Examiners
   2. Defense Contract Audit Agency
   3. Department of Health and Human Services
   4. Internal Revenue Service

2. State Government Agencies
   1. State Auditor Office
   2. State Finance Office
   3. Franchise Tax Board
   4. Department of Health and Human Services
## FINANCIAL SERVICES SALARIES

<table>
<thead>
<tr>
<th>JOB TITLE</th>
<th>US$ MIN</th>
<th>US$ MAX</th>
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</thead>
<tbody>
<tr>
<td>Governance, risk, and compliance (continued)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>KYC/CDD Officer</td>
<td>45,800</td>
<td>62,100</td>
</tr>
<tr>
<td>Chief Risk Officer</td>
<td>294,300</td>
<td>490,500</td>
</tr>
<tr>
<td>Head of Risk Management</td>
<td>163,500</td>
<td>261,600</td>
</tr>
<tr>
<td>Credit Risk Manager</td>
<td>81,700</td>
<td>179,800</td>
</tr>
<tr>
<td>Market Risk Manager</td>
<td>98,100</td>
<td>189,600</td>
</tr>
<tr>
<td>Operational Risk Manager</td>
<td>98,100</td>
<td>156,900</td>
</tr>
<tr>
<td>Risk Analyst</td>
<td>58,800</td>
<td>91,600</td>
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### Finance and accounting*

*For additional finance and accounting roles, please see page 10.

<table>
<thead>
<tr>
<th>JOB TITLE</th>
<th>US$ MIN</th>
<th>US$ MAX</th>
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<tbody>
<tr>
<td>Chief Financial Officer (CFO)</td>
<td>277,900</td>
<td>457,800</td>
</tr>
<tr>
<td>Finance Director</td>
<td>147,100</td>
<td>245,200</td>
</tr>
<tr>
<td>Financial Planning and Analysis</td>
<td>145,200</td>
<td>228,900</td>
</tr>
<tr>
<td>Financial Controller</td>
<td>147,100</td>
<td>238,700</td>
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### Transaction and wholesale banking

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<tr>
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<th>US$ MAX</th>
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</thead>
<tbody>
<tr>
<td>Head of Corporate/FI Banking</td>
<td>295,000</td>
<td>515,000</td>
</tr>
<tr>
<td>Senior Corporate/FI Relationship Manager</td>
<td>145,000</td>
<td>180,000</td>
</tr>
<tr>
<td>Corporate/FI Relationship Manager</td>
<td>99,000</td>
<td>153,000</td>
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</table>

### Global markets (FX, equities, and FICC)

<table>
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<tr>
<th>JOB TITLE</th>
<th>US$ MIN</th>
<th>US$ MAX</th>
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</thead>
<tbody>
<tr>
<td>Head of Trading/Portfolio Management</td>
<td>228,800</td>
<td>376,000</td>
</tr>
<tr>
<td>Senior Portfolio Manager</td>
<td>147,100</td>
<td>212,500</td>
</tr>
<tr>
<td>Portfolio Manager</td>
<td>98,100</td>
<td>147,100</td>
</tr>
<tr>
<td>Analyst</td>
<td>58,900</td>
<td>107,900</td>
</tr>
<tr>
<td>Head of FX Sales</td>
<td>140,600</td>
<td>196,200</td>
</tr>
<tr>
<td>FX Sales Manager</td>
<td>98,000</td>
<td>124,300</td>
</tr>
<tr>
<td>FX Sales</td>
<td>58,800</td>
<td>91,600</td>
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How We Prepare Students

1. Relevant Finance courses to prepare students
2. Resume and Interview Practice Workshops
3. Department Career Development Workshops
4. Finance Career Fair
5. Pioneer Jobs Handshake website
6. Email Job Opportunities directly to students to apply
7. Beta Alpha Psi (BAP) hosts seminars and office visits
Resources and Experiential Learning

1. Finance Trading Lab – VBT 222

2. Trading Simulations, Financial Modelling, etc.

3. Student Competitions
   - The Chartered Financial Analyst (CFA) Institute Research Challenge
   - The Chicago Mercantile Exchange (CME) Group Trading Challenge
Success Stories

1. Successful Partners in many top accounting firms
2. CFO in major companies
3. Controllers in major companies
How to be Successful in Finance

1. Work hard, study the materials and get good grades
2. Develop excellent communication skills
3. Develop teamwork skills
4. Develop quantitative and problem-solving skills
5. Develop analytical and data analytics skills
6. Obtain relevant work experience
Contact Information

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