

# So you want to work in investment banking...

The investment banker acts in a capital markets advisory capacity to corporations and governments. Investment bankers help their clients raise money in the capital markets, provide various financial advisory services, and assist with impactful mergers and strategic acquisition activity.

## Functional Skills



### Financial Analysis

Highest level of technical expertise in corporate financing and ability to resolve complicated and financial challenges are critical. Financial accounting is the language for business and bankers need to be comfortable with the subject. Being able to identify the relevant issues and skillfully analyze the client's complex problems to reach insightful conclusions is paramount.

#### **Recommended Courses that Focus on Understanding Client Needs**

- 7601 Financial Reporting (FY-Q4)
- 8190 Taxation and Management Decisions (Q1)
- 8423 Corporate Financial Policies (Q1)
- 8171 International Corporate Finance (Q2)
- 8625 Mergers and Acquisitions (Q3)
- 8470 Corporate Financing (Q3)
- 8410 Financial Statement Analysis (Q3)
- 8160 Taxation of Mergers and Acquisitions (Q4)

#### **Recommended Courses that Focus on the Role of Capital Markets**

Select from these courses depending on the needs of specific job positions or industries.

- 8426 Derivative Securities: Options & Futures (Q1)
- 8290 Venture Capital (Q1)
- 8453 Entrepreneurial Finance & Private Equity (Q1, Q2)
- 8500MM Applied Security Analysis (Q1, Q2)
- 8490 Financial Institutions and Markets (Q3)



### Strategy

Investment bankers are strategic advisors that help C-level executives realize their overall objectives. Bankers identify the business opportunities that can generate the most attractive valuations and implement strategic plans to capitalize on those prospects. You'll apply intellectual curiosity and superior research skills, to address your clients' challenges. You will also need to understand how firms plan and execute and will need those skills yourself.

#### **Strategy and Planning Focused Courses**

- 8830 Supply Chain Management (FY-Q4)
- 8310 Competitive Dynamics (Q1)
- 8465 Management Planning and Control (Q1)
- 8014 Strategic Thinking (Q2)
- 8621 Project Management (Q2)
- 8800 Operations Strategy (Q2)

#### **Economics Courses**

Financial managers need a keen understanding of global markets, including the drivers of economic policy and economic conditions. Any courses offered by the GEM area will be useful – tailor your selection to your particular interests and/or the field you will be entering.

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## Interpersonal Skills

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The need for strong interpersonal and leadership skills grows as one progresses from a Senior Financial Manager to the role of Chief Financial Officer. Many alumni emphasize the importance of the courses discussed below and highly recommend them to current students.



### Leadership

In order to garner trust with your clients, develop and build exceptional teams of analysts and junior bankers, and create lasting change inside an organization, you will need to draw on exceptional leadership skills—and your own unique style that will evolve over time.

- 7619 Paths to Power (FY-Q4)
- 8019 Defining Moments (Q2)
- 8013 Strategic Corporate Governance (Q3)
- 8706 Leadership, Diversity and Leveraging Difference (Q4)
- 8274 Leadership When it Really Counts (Q4)



### Presentation and Persuasion

While “hard skills” such as problem-solving and analysis are critical, it’s equally important that you are able to effectively present your recommendations in a way that is clear, compelling and truly resonates with your client. Adapting your communication style and message to a variety of audiences, and leveraging powers of persuasion are key skills to develop for an investment banking career.

- 8930 Negotiations (FY-Q4, Q2)
- 7605 Strategic Communication (FY-Q4)
- 8620 Brand Management: Creating, Testing and Analyzing New Brand Strategies (Q3)
- 8320 Leadership Communication During Times of Disruptions and Transformation (Q3)



### Creativity and Teamwork

Investment bankers need to consistently demonstrate ability to generate thoughtful, creative approaches to client needs. Problems are complex and require innovation and extensive collaboration, both with colleagues and clients in order to determine the optimal solution. The “people” side of investment banking offers an excellent opportunity to build relationships, network and partner with a variety of individuals to achieve a shared vision and great results.

- 7618 Effectual Entrepreneurship (FY-Q4, Q4)
- 8619 Leading Teams (FY-Q4)
- 8459 Innovation and Design Experience (Q3–Q4)
- 8989 Critical and Creative Thinking in Business (Q4)

Note: 7603 Valuation in Financial Markets is a prerequisite for most Finance electives.

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