

Finance Career Lab: CV Template

The CV template is designed to capture most of the key content and structure for your Finance CV. It's not an exhaustive structure so just because another you have seen is different doesn't mean that one is better than the other. However, we hope that this structure will help collate your thoughts and allow you to lay out your experience in a user-friendly manner for a hiring manager.

Created and compiled by Investment Professionals with extensive Investment Management and Advisory experience structuring investment solutions for institutional clients at some of the largest global organisations.

✅ A CV is just a snapshot of your wider story. It will never do full justice to your experience and skillset unlike sitting face-to-face with an interviewer. However, it's the key which unlocks that opportunity. Treat it well.

✅ The financial industry is hyper competitive. To ensure you get a look in, the structure of your CV will be paramount to getting considered by hiring teams.

✅ Keep it to 1 page. Hiring managers and recruiting teams receive hundreds, if not thousands, of applications for any given vacancy. At this stage of your career, no one has time to read more than 1 page.

✅ Sit down and think carefully about your wider experience and what it is you wish to communicate to somebody reading your CV. Try to condense your experiences into concise points to paint a clear picture.

✅ The little things in life count. That includes font sizes, font types and spelling/grammar. Triple check before hitting the send button!

The information populated in the CV template is for illustrative purposes only and should be tailored to your specific experiences, both educational and professional. Use this opportunity wisely, remember, it's your opportunity to make that first impression on your prospective employer.

For more tools, including a CV Hints and Tips sheet, visit the www.FinanceCareerLab.com and join the mailing list for ongoing insights and early access to new resources.

Disclaimer: The information in this document is for educational purposes only and should not be interpreted as a guarantee of job offers or hiring outcomes. The content provided is solely based on industry experience and personal perspective and may vary from individual to individual

Name Surname
Name.Surname@gmail.com | +44 7123 456 789 | London, UK

Education and Professional Qualifications

Chartered Financial Analyst (CFA), CFA Institute UK MMM YY – MMM YY

- Passed Level 1 and 2 on first attempt
- Level 3 pending

Investment Management Certificate (IMC), CFA Society UK MMM YY

University of XYZ MMM YY – MMM YY

- BSc [Economics] with Year in Industry; Grade ([Achieved/Predicted]): [Insert Grade]
- Key Modules: List out the key modules relevant to the roles/industry you are applying for, including any final year projects. If completed/pending final year project, then list this out if applicable

ABC School and Sixth Form MMM YY – MMM YY

- A Levels: Subject 1 [Grade], Subject 2 [Grade], Subject 3 [Grade]
- GCSE: Group grades together and separately specify Maths and English Language grades
- [Key awards/Scholarships]

Work Experience

ABC Investment Management, Credit Research Summer Intern MMM YY – MMM YY

- 3-6 key bullet points outlining areas such as: department worked in, desk coverage, roles and responsibilities, projects worked on, actionable impact on the team

Finance and Investment Society, University Treasurer MMM YY – MMM YY

- 3-6 key bullet points which are specific to your involvement in any relevant university societies [only include in this section if you do not have direct work experience to speak to]. Points should be specific to how you added value to the society and not exaggerated

Non-Finance Job, Job Title MMM YY – MMM YY

- If you do not have finance related experience then include any work experience you have but ensure to extract transferable skills such as sales, communication, problem-solving, client-facing exposure and where possible quantify any impacts you have **directly** had

Skills

- **Technical:** Specify programme/software and proficiency level e.g. Bloomberg, Morningstar, Python, VBA, JavaScript etc. Can also include any relevant financial modelling/forecasting skills you have acquired through work/university
- **Communication:** Specify relevant soft skills. E.g. Debating societies, etc.
- **Languages:** Language and proficiency

Interests and Hobbies

- This section does not need to be relevant to Finance/Investment. However, if there is something you believe is connected and adds value then still do add.