



CWIB

INVESTMENT BANKING

INDUSTRY ONE-PAGER

INDUSTRY OVERVIEW

Investment Banking is separated into 2 categories: connecting people who have capital to those that need it and advising companies on a series of financial transactions like mergers & acquisitions, IPO's, divestures and more.

RELEVANT COURSES

- **Busi 408:** Corporate Finance
- **Busi 407:** Accounting
- **Busi 520:** Excel Spreadsheets and Modeling

KEY CONTACTS

Cayla Hashe

RELEVANT SKILLS

Day to day responsibilities include creating financial models in excel, updating "pitch books" that are PowerPoints show clients, and talking with clients. Below are some relevant skills:

- Successful working in a team environment, as well as independently
- The ability to work under pressure and multi-task
- Communication skills
- Financial analysis skills – although these will be taught on the job so no need to stress if you don't know an yet!

LOOKING FORWARD

Recruiting Process

Full-time Investment Banking jobs are typically filled entirely by the internship class. The internship recruiting process for the summer after your Junior year kicks off in the beginning of Sophomore year.

- Network! This is crucial to get a first-round interview
- Video Interview or First-round interview
- Superday (a series of interviews in the bank's offices)

Additional Resources

SUBHEADING

- 400 M&I Guide (you can google this and find a pdf of the guide for free)
- UNC Finance Society Investment Banking Bootcamp: If you think you want to enter this industry, this bootcamp will walk you through the steps to get there.