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Finance application checklist

The Investment Analyst.com

Spring weeks, internships and graduate programs in equity research and asset management. Work down each list, and tick it off as you go.

1. Plan your list

- [ ] **Choose a focused list of firms.** A short list of well-researched, tailored applications beats a mass campaign.
- [ ] Record each firm's opening date and deadline. Many review applications as they arrive, so apply early.
- [ ] Check eligibility: year of study, degree and location.
- [ ] Know which division you are applying to, and why that one.

2. Your CV

- [ ] One page, most recent first, with results and numbers where you have them.
- [ ] Show your interest: investment or finance societies, stock pitch competitions, a portfolio you follow.
- [ ] Plain layout that applicant tracking systems can read: no tables, columns or graphics.
- [ ] Tailored to the role, and proofread by someone else.

3. The application form

- [ ] **Why this firm, why this division, why you**, each with a specific reason or example.
- [ ] Every answer inside the word limit, and saved so you can reuse your best lines.
- [ ] Mention something real about the firm: a deal, a fund, a recent result or a person you spoke to.

4. Online tests and video interviews

- [ ] Practice numerical and verbal reasoning under time pressure.
- [ ] Practice situational judgment questions: read each one as the firm would.
- [ ] Record yourself answering a question on camera before the first video interview.

5. Technical preparation

- [ ] **The three financial statements** and how a change in one moves the other two.
- [ ] **Valuation:** multiples and discounted cash flow, and when to trust each.
- [ ] **One stock pitch, ready to go.** Write it as one sentence: the call, what the market believes, what you believe, your evidence and a catalyst with a date. Our free stock pitch template walks you through it.
- [ ] Follow the markets daily, and have three recent stories you can discuss and give a view on.

6. Interviews

- [ ] Your motivation story in two minutes: why finance, why this area, why now.
- [ ] Three examples of teamwork, leadership and a setback, each told as situation, action and result.
- [ ] Two or three questions for the interviewer that show you did the reading.
- [ ] Logistics checked the day before: time, place or link, and who you are meeting.

7. After each stage

- [ ] A short thank-you note where you have a contact.
- [ ] Write down what you were asked while it is fresh.
- [ ] Update your tracker (page 2) and set the next deadline in your calendar.

Application tracker

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One row per application. Firms often close early, so check each firm's own careers page for its dates.

Firm	Program	Opens	Deadline	Applied	Test	Interview	Outcome

Status ideas: **Not open**, **Open**, **Applied**, **Test done**, **Interview**, **Offer**, **Closed**.