



Resume Template

Investment Banking Resume Templates

Resume Template: Investment Banking

I. Background

- Candidates should have a clean and updated resume handy, both physically and electronically, at all times during the networking process.
 - i. Candidate: An individual who would like to enter the investment banking industry.
 - ii. Networking Process: Events, conversations, and interviews that provide exposure to investment banking practitioners.
- The resume is provided by the candidate to the practitioners and is used as a reference tool throughout the networking process.
 - i. The practitioners will refer to the candidate's resume for contact information and background on past work / educational experiences.
- The candidate should attach a resume on all initial networking emails (especially cold emails).

II. Tips and Tricks for Effective Resume Building

- Resumes should be proofed for spelling and grammatical errors.
- Resumes should be fully-accurate and up-to-date, and should never contain any false information relative to current or past positions.

- Physical resumes should be printed on professional resume paper, positioned in portrait orientation, and placed on an 8 1/2 in. by 11in. sheet.
- Resumes should be written to reflect the present scenario - meaning that current experiences should be written in present tense and past experiences should be written in past tense.
- Resumes for junior candidates should be one page in length.
 - i. The only time a resume longer than one page is acceptable, is if the candidate is a senior practitioner and has a long list of relatable deal flow, publications, or licenses.
- If the candidate is currently in college, place educational experiences first and work experiences second.
 - i. If the candidate is currently in the workforce, list work experiences first and then educational experiences second.
- Be sure to include job-specific licenses and any relevant extracurricular activities or hobbies that could translate into a beneficial skillset for the position.
 - i. For example: college athletics, leadership roles, entrepreneurship, computer skills, participation in finance-related clubs or strategy-related clubs (e.g., chess club), musical instruments, language proficiency, and volunteer work.
- When including deal flow experience:
 - i. Use the client company's real name if the deal has been closed and is publicly available.
 - ii. Use the project code name if the deal is ongoing, if the deal is non-public, or if the deal failed to close.

III. Resume Template Example

<PLEASE SEE BELOW>

[Name]

[Street Address]

[Email Address]

[Phone Number]

WORK EXPERIENCE

[Company Name]

[City, State]

[Position / Role]

[Month Year – Present]

- [Engage in early-stage capital markets advisory for tech-enabled clients.]
- [Develop fully integrated three statement financial models and adjacent financial analyses.]
- [Create and maintain valuation materials utilizing guidance from public comparable companies and precedent transactions.]
- [Support day-to-day deal execution and client management.]
- [Lead due diligence efforts and the creation of investor presentation materials.]
- **Closed Transactions:**
 - Advised on [Client Name] \$XX million Series B equity raise, led by [Investor Name].
 - Advised on [Client Name] \$XX million Series A equity raise, led by [Investor Name].
 - Advised on [Client Name] \$XXX million syndicated debt refinancing, led by [Investor Name].
- **Transactions that did not close:**
 - Project Topher's [B2B payments client] M&A sell-side process
 - Project Cipher's [AI Reformulation client] dual-track process
 - Project Neptune's [AI Metrology client] equity raise process

EDUCATION

[Graduate School Name, Business School Name]

[City, State]

[Degree Name, Designation (if any)]

[Month Year (of Graduation)]

Focus: [Quantitate Finance]

[Undergraduate School Name, Business School Name]

[City, State]

[Degree Name, Designation (if any)]

[Month Year (of Graduation)]

GPA: [X.XX]

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Bloomberg Certified, Pitchbook, FactSet, C++

FINRA Licenses: Series [x], Series [x], and Series [x]

Finance Designations: CFA Level [x] completed on [Month Year]

Activities: Division 1 College Baseball, Key Club, and Chess Club

Interests: Cycling, Cooking, Investing, Singing

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