



Get

into

Finance

CISI 

CHARTERED INSTITUTE FOR
SECURITIES & INVESTMENT

Finance is not just about
spreadsheets and numbers.

This guide aims to sum up the
world of finance and help you
decide whether it is a great
career path for you, and how
you find your way into the
financial services sector.



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why?

Find out why you should consider finance as a career path and what you can benefit from in the profession.

cisi.org/why

Why financial services?

You may be asking yourself 'why should I consider finance' or 'finance doesn't sound very popular'. However, the financial services sector is a great contributor to the UK's economy, and a lot of people are in fact employed within the sector..

Over 2.2 million people are directly employed in financial and related professional services (that's the size of the Stockholm Metropolitan Area!). As one of the UK's largest sector contributors, financial services are crucial to every economic activity in the UK.

The City of London is the highest ranked financial centre in the world and a third of overall employment in the financial sector comes from the City, but London isn't the only place where there is a financial hub. Other key cities across the UK also have large financial services presence including Birmingham, Bristol, Edinburgh, Glasgow, Leeds and Manchester, so it's much bigger than you might think.

So why financial services?

It is fundamental to the UK economy

It supports jobs and growth across the UK

It helps businesses – big or small – grow

It helps people in their everyday lives

What are the benefits of working in financial services?

There are a wide range of roles and career progression opportunities (see page 10)

There is a higher earning potential in finance compared to other sectors

There are international prospects

It is a rapidly evolving profession

Did you know more than two-thirds of financial services employees are based outside of London



Employment in UK-based financial and related professional services

Total Employees
2,215,000

Scotland
150,000

Northern Ireland
32,000

North West
215,000

Wales
56,000

West Midlands
137,000

South West
167,000

South East
285,000

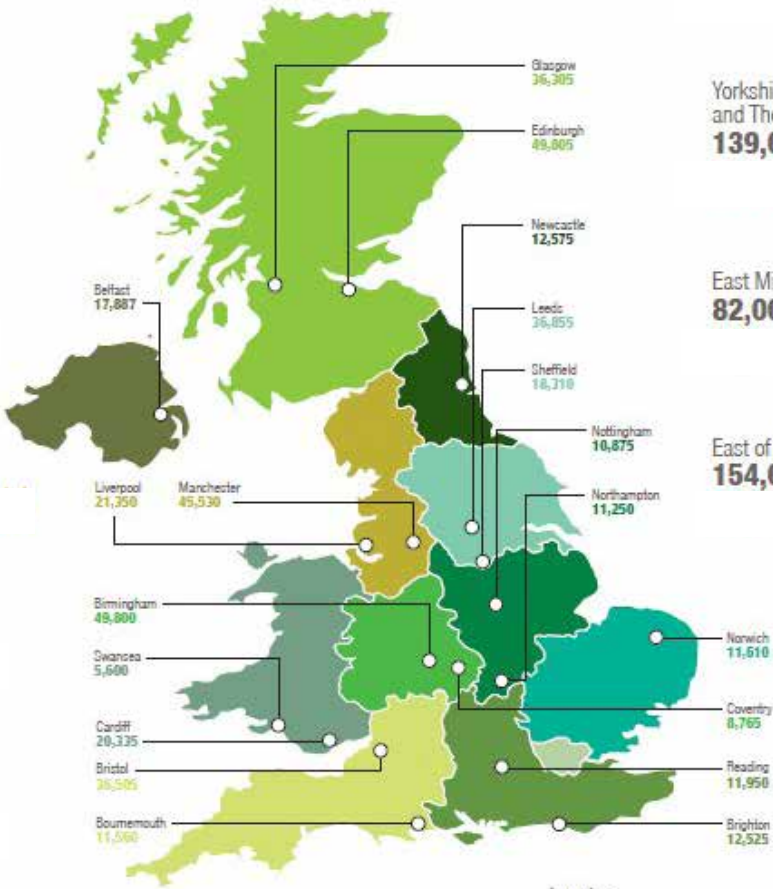
London
751,000

North East
47,000

Yorkshire
and The Humber
139,000

East Midlands
82,000

East of England
154,000



Source: TheCityUK, KEY FACTS ABOUT UK-BASED FINANCIAL AND RELATED PROFESSIONAL SERVICES

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what?

Finance is not just about money. Get an idea of the ins and outs of finance and the different skills and subjects that help.

cisi.org/what

What are financial services?

Financial services help with the investment, lending and management of money for people, like us, and organisations. These activities can range from trading shares on the stock market, or helping you save money for your future plans.

Retail Banks do much more than just store your money. So, what does your money do? Banks use your stored money and lend it to people who need the extra cash.

Let's say someone wants to buy a house or a new car. The bank will give them money and the borrower would then pay the borrowed amount back along with an additional cost in the form of interest.



Interest

This is the charge paid for borrowing money. It's usually shown as a percentage rate over a period of time eg. 5% per annum.

Banks aren't the only ones who handle money, organisations do too. Trust funds or wealth managers might buy commodities like coffee or oil with an aim to buy at a low price and then sell at a higher price to make a profit.

From making profits to advising, the financial services profession also helps the public by giving advice on how they can make the most of their savings.

It's not just about money

There are other parts to finance – job roles aren't just about investing people's money. There are many other roles, such as analysts, economists, technicians through to officers and programmers.

Whether you're looking for opportunities to progress or a fast-paced environment, financial services has a range of roles and specialisations for everyone.

Get a better understanding on the financial services sector with our videos. Visit cisi.org/what for more information.



What skills and subjects can

The reality is that you don't have to study a subject that's purely about finance to get into excel in the world of finance. Below are some examples.



Computer Studies & IT

Everything is affected by computers and information technology. It is constantly evolving, and everyday there is something new. It is important that people making decisions related to the buying and selling of products have all the up to date information at hand. Those in financial services are highly dependent on IT systems and rely on technology. FinTech is a perfect example of how technology can disrupt the finance sector as new technologies are used to create better services for both consumers and businesses. These digital tools are disrupting traditional business models with new ideas and solutions.



English

English is a subject that is widely accepted. Communication is crucial and you'll need to be effective at communicating effectively and efficiently. Presenting is common in the financial services sector and you might need to deliver a big presentation that comes your way (we mean potentially 300 people). Jobs in the finance sector include public relations and financial journalism and event management.



History

History equips you with good analytical skills. Financial services professionals are required to use these skills to gather research and analyse trends – both past and future – to determine the most suitable products for their client so they can get the most reward.



Languages

The finance services sector is global. Being able to speak other languages is a huge benefit and can ensure that things run smoothly. Even though a large proportion of people speak English in the financial services sector, having another language builds better relationships through the understanding of local customs and business.

Margins

This is how much profit you make on a specific product.



get me into finance?

the finance sector. Each subject can equip you with the skills and expertise required to



Maths

This is used for many roles in the sector. Possessing great numerical skills helps when dealing with money as well as dealing with the analysis of data, such as profits, margins and even future predictions and forecasts.



Business & Economics

The study of business operations and the production, distribution and consumption of goods and services. Knowing how this works is an important part of working in finance. Piecing together connections between what's going on in the world and how that affects the price of goods and services and people's needs sets you apart from the rest.



Science

Science skills equip logical thinkers, problem solvers, analysers and so much more. These skills help you fly through science, and they will also help you go far in the world of finance.



Citizenship

You would need to be adaptable to changing situations and understanding of different work practices, time zones and cultures. Citizenship teaches you to be active, informed, responsible and knowledgeable about the social and political world. Financial services professionals must act ethically and responsibly and be honest, fair, open and transparent in all business practices.



Engineering

Like science, the skills you gain from engineering subjects can be widely implemented in the world of finance. Engineering requires you to have quantitative skills, a technical competency, a desire for efficiency and an ability to adapt to many different situations and environments.



Get a better understanding on the financial services sector with our videos.

Visit [cisi.org/what](https://www.cisi.org/what) for more information.

Front office



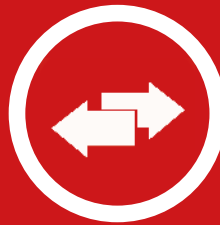
Wealth Management

The managing of money. Investment managers advise people on how and where they should invest to help them get the most from their money.



Insurance Insurance brokers analyse clients' needs and negotiate the best deal with insurance companies for individuals or for businesses. There are a wide range of jobs in the insurance sector.

These range from analytical roles to general business management.



Sales and Trading

This function within an investment bank is to help governments, commercial and non-commercial organisations raise money through selling securities such

as bonds and equities. In this area, you can deal with anything from stocks and bonds to foreign exchange, while researching the market for the best opportunities.

Middle



Legal & Compliance

The finance sector is regulated with local and international laws and regulations so legal experts are required to oversee projects and consult

on issues which may impact the business.

Compliance officers are responsible for implementing internal policies reflecting the 'rules' of the profession and to make sure the organisation's practices are legal and lawful.



Accounting This the reporting of financial information. Job roles can include risk management, budgeting and planning internal finance, to ensuring that staff and suppliers are paid correctly.



Human Resources (HR)

HR is responsible for assessing, hiring and developing new and existing employees. The department plays a vital role in boosting productivity across

the business. Responsibilities include pay and benefits, recruitment and adhering to laws relating to the company and employees.



Retail & Corporate Banking Retail/High street banks provide services, such as loan facilities and financial advice, to businesses and members of the public. They also have branches across the UK.

Jobs in retail banks are mainly customer-facing.

Corporate banking provides financial services tailored to meet the needs of large organisations. Commercial banking requirements are suited for larger companies as the volume, size and detail of transactions are significant and potentially riskier.



Financial Planning Financial planning plays a significant role in helping people get the most out of their money. Careful planning can help people define their goals and objectives,

and work out how these can be achieved in the future. Financial planning can look at all aspects of someone's financial situation and may include tax planning.

office



Risk Management

This role is about the identification, assessment, prioritisation and management of potential risks that could come up.

Some risk managers work within trading and investment banking areas where statistics and financial modelling help to set trading limits, while others focus on risk management of projects, planning backup plans in the event of a disaster.

Back office



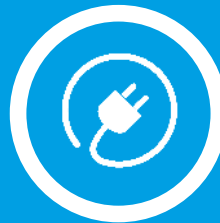
Marketing & Public Relations (PR) Organisations need to ensure that they are maintaining their customer base and growing their business. PR, communications and marketing teams

are tasked with projects which develop a strong brand and maximize awareness.



Operations This role is responsible for overseeing the life cycle of a transaction from the start to post-trade processes in settlements. Roles can include supervising the administration and

performance measurement of investment portfolios.



IT Technology is now embedded into the financial services sector and contributes massively to the success of a company. Roles are available in IT support, programming, project

development and management, analysis and systems administration.

#yourmoney

Everything You Need to Know about Earning, Spending and Saving



- # How to start saving and what to do with those savings
- # How to make sense of payslips, what the difference is between credit and store cards, and how bank overdrafts work
- # The role money plays in life and the number of money-related decisions made on an average day

AND LOTS MORE

“The book lays out everything that as a parent I wanted to tell my children but they wouldn't listen to me. Jeannette keeps things simple but is never condescending.”

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who?

Hear from those who have chosen finance as a career and the different routes they have taken.

cisi.org/who



How did you get into financial services?

When I graduated, I wrote to ten local Financial Planning companies asking if I could come in for some work experience. Of the ten, two replied. One to politely say no and the other was a call from Churchouse (now Chapters) Financial Planning inviting me to the office for a chat.

It turned out that their administrator had left the week before they received my letter and they liked that I had taken the initiative to start studying for my first exam. I was offered a three month temporary contract and the rest is history!

What attracted you to it?

When I was 12, there was a TV show called 'Your Money or Your Life' with Alvin Hall that analysed people's finances and helped them understand how best to achieve their goals – I have wanted to be a Financial Planner ever since.

What do you enjoy most about your job?

I love the variety that my roles offers. Every day is so different and filled with a mixture of tasks such as report writing, research and project work that there is never the opportunity to get bored. Especially as this is spread over so many different areas too, such as pensions, protection and estate planning.

Hear from a paraplanner

Farida Hassanali CFP™ Chartered FCSI, Paraplanner, UBS Wealth Management

What advice would you give to someone interested in financial services?

Get as much experience as you can. This doesn't have to be limited to the working environment. Experience can come from many different sources such as part time jobs, summer internships, volunteering or joining the committee for clubs you are part.

There are lots of different roles available within financial services and a range of experience will help you find what you are most passionate about.

Have you studied any CISI qualifications?

I studied for and passed the Certified Financial Planner™ qualification in 2014 with the Institute of Financial Planner (IFP), which merged with the CISI in 2015.

How have your CISI qualifications helped you progress?

This is a case study based qualification and I feel that it taught me how to apply my knowledge to an overall client scenario rather than looking at different areas in isolation. This is much more realistic and really helped to improve my confidence when assessing a client's current situation and how they can best meet their goals and objectives.

Why did you become a member of the CISI?

I was previously a member of the IFP and automatically became a member of the CISI as part of the merger in 2015. I remain a member because the staff at the CISI are just as passionate about promoting Financial Planning for the benefit of the consumer as us and continue to provide great content that helps me to meet my Continuing Professional Development (CPD) targets.

Do you use your CISI designatory letters, a valuable CISI membership benefit?

I certainly do at every opportunity! Passing the CFP™ qualification is one of the proudest moments in my career and I still vividly remember the day I came home to find the letter on my doorstep. I feel that this is an important globally recognised qualification. I also feel that my Chartered FCSI designation helps to reinforce the level of experience I now have in the profession.

Hear from a wealth management adviser

David Hearne, Chartered MCSI, Wealth Management Adviser, Satis Asset Management

How did you get into financial services?

I started working for Black Horse Financial Services as a Financial Consultant in branches of Lloyds Bank. I was 21 and embarked on an intensive course to qualify. I had previously worked as a retail management trainee at Sainsbury's.

What attracted you to it?

The opportunity to have more personal responsibility, and for my earnings to be related to effort, were attributes which attracted me to financial services. My first role was primarily a sales role and having studied business and finance at school, I hoped I would be able to qualify quickly.

What do you enjoy most about your job?

I enjoy knowing that I can help people to either understand, or not worry about, complex financial matters, and hopefully this enables them to enjoy their retirement without worrying about money. I particularly enjoy the variety of my work. Despite the similarity of the needs of our clients, each one has different requirements.

What advice would you give to someone interested in financial services?

Be clear about why you are doing it, and identify the role you think will suit you best. Working with clients requires very different skills to working in a back office function, such as operations. I would also say to study widely. I took an A Level in Economics at night school. Whilst it is good to be an expert in your field it is also important to have a wider understanding of your firm, your sector and the economy it operates in.

Have you studied any CISI qualifications?

Yes, I studied and sat the CISI's Certificate in Private Client Investment Advice and Management (PCIAM). Managing work and study is difficult but is vital if you want to pass. I found getting to work early and studying before my day started was the best way to concentrate, as I found leaving it to the evenings or weekends to be difficult.

How have your CISI qualifications helped you progress?

My PCIAM qualification and my CISI Chartered membership have helped me to distinguish myself from my peers.



Why did you become a member of the CISI?

Initially, because I wanted a job in the private banking section of my previous employer. I spoke to existing private bankers about the exams they were required to take for their roles. I chose the CISI to record my Continuing Professional Development (CPD) and I am keen to reach Chartered FCSI status.

Do you use your CISI designatory letters, a valuable CISI membership benefit?

Yes, I use Chartered MCSI and the Chartered Wealth Manager title, earned by completing the CISI's PCIAM qualification. I find using my designatory letters can be a good way to start a conversation with clients about my additional qualifications and they are always a discussion point with my peers about the benefits of being a CISI member!

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Hear from a dealer, investment management

Susan Travers, Dealer, Rathbone Brothers

How did you start your career in financial services

I started my career at Pershing in 2006 after graduating with a 2:1 BA(Hons) in Accounting and Finance.

I have been with Rathbones since 2010, originally as part of the Settlements Team before moving to the Central Dealing Team in 2013.

Why did you decide to work in financial services?

I have a long standing interest in financial markets and chose to study Accounting and Finance at university.

What are your main responsibilities?

My role is to execute trades and to advise Investment Managers on market conditions and technical matters relating to the execution of their orders; ensuring best execution at all times.

What does a typical day look like?

I work London market hours & the LSE is open from 8am to 4.30pm, so I make sure I am sat at my desk well before the opening bell.

My day can be quite difficult to plan. I don't really have meetings or projects to work on like other people. After I have sent out my morning report of relevant news to investment managers, the rest of my day is spent trading.

I trade shares, investment trust, gilts, corporate bonds and unit trusts, which makes for a varied day.

What do you enjoy most about the job? And least?

I enjoy the fast paced nature of the desk. Every day is different.

It can be quite stressful and every day I need to be on the ball, taking care with every button I press. If and when I do a mistake, I have to be diligent enough to correct it and escalate accordingly.



What do you think are the most important skills, knowledge & behaviours needed to do your job?

Communication skills are vitally important. I spent a large portion of time on the phone communicating with both investment managers, various brokers in the market and internal teams. Being able to talk confidently on the telephone is a vital skill.

It is really a role where initiative and strength of character are incredibly important.

Have you completed any CISI qualifications? If so, what?

I have completed the Investment Operations Certificate (IOC), the Investment Advice Diploma (IAD) and then the Chartered Wealth Manager qualification, which is the highest qualification the CISI offer.

I have studied for a further four or five years after finishing university.

How have your CISI qualifications helped you progress within the sector?

Completing CISI qualifications shows my employer that I am serious about my career and my own personal development.

Studying to such a high level has helped me achieve specialist knowledge that is relevant to my role and given me confidence in my abilities.

Finally, what's the one piece of advice you'd give to a school-leaver/graduate?

Part-time jobs and voluntary work help you build interpersonal skills which you can't get elsewhere.

It shows that you understand the working environment and that you can work well as part of a team.



Oliver Balchin, Sales & Distribution Apprentice, M&G

Hear from an investment operations apprentice

As an apprentice at M&G, Oliver is also a member of the Investment 2020 Programme and he is currently studying the CISI's IOC.

Why did you choose a career in financial services?

I chose financial services because of the career prospects. There's a 'long ladder' to climb with so many opportunities. I also find it inspiring to work in the heart of the City.

What made you decide to do an apprenticeship?

After four years I will have the same level of qualifications as a graduate, but I will have a lot more value to offer, through the practical experience I will have gained, and the professional networks I will have built.

Tell us about your role as an apprentice...

I get in the office nice and early, and have breakfast while I check up on the financial and business news – it's important to know what's going on. I have various ongoing responsibilities, particularly supporting the sales directors with arranging meetings and diary management. I'll often be working on preparing presentations and pitches for upcoming meetings as well. If I have any spare time at the end of the day, I'll try and squeeze in some study!

What do you enjoy most about your apprenticeship?

Although I am the foot of the business, I sit with and work directly with senior colleagues. My team challenge me with tough work, and show recognition when I do it well. Even though I'm the junior of the office, I'm treated the same as any other member of staff.

How are you managing your IOC study?

As well as using the IOC workbook to study from, I also find it useful to dip in and out of as a reference in my day-to-day role. The equities and derivatives sections have interested me the most so far.

Would you recommend the apprenticeship to others?

Yes. I think apprenticeships are for a certain sort of person. You are given almost immediate, full-on exposure to working, so I think it is important you are outgoing, ambitious, ready to get on, and not afraid of criticism.



Want to see more case studies?

Visit [cisi.org/who](https://www.cisi.org/who)

Hear from a university graduate

John Rooney, Corporate Actions Senior Representative, Pershing

What qualifications did you take for GCSE and A Level?

GCSE: Maths, English Language, English Literature, French, German, Geography, History, ICT, Physics, Chemistry

A Level: Maths, Physics, Economics, Further Maths (AS)

What CISI qualification did you take at school and why did you decide to study for and take that qualification?

CISI Introduction to Securities & Investment: I decided to take up my school's offer of this qualification as I was keen to look past the short term hurdles of A Levels and University, and aim to get an advantage in the job market when I graduate. As an introductory module, I thought this offered a good foundation for a world of investments.

Did you go to university? If so, which one and what degree were you awarded?

I went to Newcastle University and studied Economics Bsc (Hons). I was awarded a 2:1 Classification.

How did the CISI qualification help you in your career?

I definitely think having just that introductory module of the IOC put me ahead in the job market. The growing competition in the graduate job market means you need to differentiate yourself from the rest. Regarding my career working in operations departments of large investment management firms, I will always say that the first module of the IOC taken at school laid the building blocks of it all. It fuelled my interest in the finance sector, specifically in dealing with securities, and the knowledge gained all those years ago is still extremely relevant. I have since built on this by taking and passing further exams.

Why did you decide to follow that career?

I honestly believe that the Introduction to Securities & Investment module positively impacted my choice of career. Studying Economics at A Level opened my eyes to the economy at a micro and macro level, and commencing my studies for the IOC complemented it perfectly. I was hungry to learn the technical details of the investment sector, and the IOC module gave me the foundation of my knowledge. With my numerical skills, I was confident that I could go far in the investment sector, and even back then I was planning for further CISI exams I could take in the future.



What advice would you give to someone considering studying a CISI qualification at school?

If you have the opportunity, it's a must. The benefit of having a qualification from such a well-respected organisation is invaluable for both school-leavers and graduates. Whilst having a professional qualification may seem like a luxury you can't afford – sixth form/college years are stressful as it is – it really will pay off if you dedicate some time towards it. It's an investment that will prove itself valuable when it's time to enter the job market – showing not only the technical knowledge you will have learnt, but demonstrates a dedicated, knowledge-thirsty character to potential employers.

Did you face any particular challenges whilst studying the CISI qualification at school and how did you overcome these?

I would say one challenge was the fact this was an extra-curricular activity I had taken up and as such we had to fit studying around our school timetable. Taking the exam only a few weeks before my A Level exams also made the multi-tasking harder, but I knew that passing the exam would pay off and I ensured I put the hours in.

Another challenge would be the fact that studying for this CISI qualification was different to what I had faced in other school subjects. Faced with little class-time in which to absorb the material, I began teaching myself outside of the classroom where I was understanding new topics from scratch, a totally new world of investments. Whilst challenging, this was also extremely fulfilling.

Are you expecting to take/have you taken further CISI qualifications to support your career?

I have since completed my IOC studies by passing the second and third modules in UK Financial Regulation and Global Securities Operations, both taken last year. I believe completing the IOC was vital as it really does complement my job in the operations function of an investment management firm. I now plan to tackle the advanced papers, and then the investment advice exams.

Do you have any other comments that you would like to pass on to A Level students?

Whilst not aiming to deter students from studying at university – having studied for three years and achieving BSc (Hons) in Economics – what I would say is that the university path is not for everyone, and school leavers can use these qualifications to enter the job market earlier than their graduate counterparts. Whichever path is chosen – one thing that is certain is that studying for and obtaining a CISI qualification whilst at school is incredibly beneficial.



how?

There's more than one way
of getting into finance.
Find out what routes there
are and which one is best
for you.

cisi.org/how

Apprenticeships

An apprenticeship combines a job with a skills development programme designed by employers. You can earn a salary whilst gaining technical knowledge and real practical experience, along with functional and personal skills, required for your immediate job and future career.

Why?

You earn while you learn.

You are more likely to progress quicker and higher than a typical student.

A real job. As an apprentice you are employed (for at least 30 hours a week), with an appropriate contract of employment and will receive the same benefits as other employees. Apprenticeships are available at Intermediate, Advanced and Higher level (right up to degree and masters level), covering more than 170 sectors and 1500 job roles.

A real future. After finishing, the majority of apprentices (85%) will stay in employment, with two-thirds (64%) staying with the same employer.

Apprentices enjoy marked salary increases when they complete their training, and those completing a higher apprenticeship could see increased earnings of an estimated £150,000 over their lifetime.

What levels are there?

All apprenticeships include elements of on the job and off the job training leading to sector-recognised standards or qualifications. Some apprenticeships also require an assessment at the end of the programme to assess the apprentice's ability and competence in their job role.

Name	Level	Equivalent educational level
Intermediate	2	5 GCSE passes at grades A* to C
Advanced	3	2 A level passes
Higher	4, 5, 6 and 7	Foundation degree and above
Degree	6 and 7	Bachelor's or master's degree

How can I apply?

Visit gov.uk/apply-apprenticeship. Vacancies are advertised on the National Apprenticeship Service (www.findapprenticeship.service.gov.uk) website.

Five reasons to study with the CISI

- 1 Many of the world's top banks take CISI exams and our qualifications are highly recognised within the profession
- 2 50% discount available on all CISI qualifications for those in full-time education
- 3 We have elearning tools which make studying interactive
- 4 Adding a professional qualification to your CV will impress employers
- 5 You will receive CISI student membership and have access to online resources, events and magazines

University

Completing A Levels and equivalent qualifications can lead on to studying at university and securing a degree.

A 2:1 degree is generally the minimum requirement for all employers. The good news is that most companies are interested in graduates from all degree backgrounds – you don't necessarily need to have a finance or mathematically related degree to be considered.

Employers will expect you to demonstrate your critical thinking analytical skills, enthusiasm and drive, rather than career-specific training. Most banks run graduate recruitment schemes and this is often the common route into jobs such as investment banking, stockbroking and analysis.

The CISI partners with universities to enable students to sit with a globally recognised professional qualification alongside their academic degree.

Find out more at cisi.org/universities.

School-leaver programmes and entry-level roles

A growing number of financial services firms now offer school-leaver programmes designed for students wanting to enter full time employment after finishing school or college.

There are a number of benefits:

No student debt

You start to earn a salary immediately

Most programmes involve studying for further professional qualifications or a degree and these are paid for by the employer

It is often easier to secure a role with a leading company as a school-leaver than it is as a graduate, when competition is tougher

Increasingly more and more companies are offering school-leaver programmes as they find taking students on at this stage very attractive

Professional qualifications

Professional bodies, such as the CISI, offer foundation qualifications to help prepare you for a career in finance.

Adding a professional qualification to your CV will help you impress employers and demonstrate your commitment to the financial services sector. Some of these can be studied independently via distance learning using workbooks and elearning.

The following CISI qualifications are suitable for school-leavers considering a career in finance:

Level 2 Fundamentals of Financial Services

Level 3 Introduction to Investment

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@CISI

Useful links

Here you will find links to school-leaver and graduate job vacancy sites, careers information and advice to help kick-start your career in financial services.

School-leavers / Apprenticeships

Milkround Milkround.com	Career resource hub specifically targeting school and college leavers
Get In Go Far getingofar.gov.uk	Information on apprenticeships, meet the apprentices, ask the apprentices, traineeships and work experience
Investment 2020 investment2020.org.uk	To promote investment management to interested and diverse talent on behalf of the UK's largest investment companies
National Careers Service nationalcareersservice.direct.gov.uk	Provides information, advice and guidance to help you make decisions on learning, training and work
Get My First Job getmyfirstjob.co.uk	Helps you find your first apprenticeship or traineeship by connecting you to the best employers and training providers

University Graduates

Prospects Prospects.ac.uk	Provides information on advice and opportunities for university graduates
Rate My Placement ratemyplacement.co.uk	Search and apply for student placements and internships
Milkround Milkround.com	Graduate career resource with hundreds of internships, placements, graduate jobs and schemes
Target Jobs targetjobs.co.uk	Combines employment opportunities with expert careers advice and independent employer information on how to get hired

Find all these links and more at cisi.org/students



How we can help you

The CISI has foundation level qualifications to help you develop the essential basic knowledge required for working in financial services.

Fundamentals of Financial Services (Level 2)



It is ideally suited to school-leavers who are considering a career in finance. You will learn about the professional sector and commonly used financial products, such as shares, bonds and insurance and it will provide you with an understanding of financial terminology.

This is a one-hour multiple-choice examination. There are 30 questions in total and the pass mark for the exam is 70%.

Please go to cisi.org/fundamentals or contact educationdevelopment@cisi.org to find out more and register.

Introduction to Investment (Level 3)



Comprehensive introduction to the financial services sector, with a specific focus on investments. The qualification covers key financial principles and products in depth including assets and markets, equities, bonds, derivatives and investment funds.

It is intended for new entrants and staff who are beginning their career in the financial services sector. The broad topics covered make the qualification suitable for all staff, not just those responsible for making investment decisions.

This is a one-hour multiple-choice examination. There are 50 questions in total and the pass mark for the exam is 70%.

Please go to cisi.org/intro or contact educationdevelopment@cisi.org to find out more and register.

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