

Get into
Finance

from classroom to career





Our Industry Supporters



Classroom to Career

Develop the next generation of finance professionals

Why the CISI? Employability

The CISI is the leading professional body for the investment industry. Our exams underpin apprenticeship and graduate recruitment training programmes at financial services firms which means students who leave full time education with a CISI qualification will be one step ahead.

Furthermore, we are able to utilise our global network of members and firms to ensure that students are provided with practitioner engagement throughout their studies.



CISI Insight Day, Tilney Bestinvest, Liverpool



The CISI Journey: where will you join us?

Schools and Colleges

Level 2 Award in Fundamentals of Financial Services



Level 3 Certificate for Introduction to Securities & Investment

AS level equivalent
UCAS points



Level 3 Diploma in Finance, Risk & Investment

Certificate for Introduction to Securities & Investment
Certificate in Finance, Risk & Decision Making
A level equivalent
UCAS points



Apprenticeships

Apprenticeships in Investment Operations

Fundamentals of Financial Services and Introduction to Securities & Investment are optional units within these programmes.

Apply via apprenticeships.org.uk



Apprenticeship in Financial Administration

Introduction to Securities & Investment is an optional unit within this programme.

Apply via apprenticeships.org.uk



Apprenticeship in Relationship Management (Banking)

There are qualifications that include level 6 CISI qualifications as optional units

Apply via apprenticeships.org.uk



Universities

Undergraduate degree

CISI exam related to finance degree



Postgraduate degree

CISI exam related to finance degree





Careers in Financial Services

On gaining employment within the industry, your students might be required by their employer to complete CISI professional qualifications. By introducing them to the CISI at school, college or university, you'll have put them a step ahead of their peers.

W WORK EXPERIENCE

I INSIGHT DAYS

S SOFT SKILLS TRAINING

A AWARDS AND BURSARIES

N NETWORKING AND LEARNING EVENTS

P PROFESSIONAL CISI MEMBERSHIP

Turn over to
explore the career
opportunities available

Wealth Management

Wealth management is all about managing money. Investment managers advise people on where they should invest and help them get the most from their money.

Sales & Trading

The functions of sales and trading within an investment bank is to help large organisations, governments, commercial and non-commercial organisations - raise money through selling securities such as bonds and equities on the capital markets. Practitioners in this area can deal with anything from stocks and bonds to foreign exchange, while researching the market for the best opportunities.

Retail & Corporate Banking

Retail banks: More commonly known as high street banks, retail banks provide banking services, loan facilities and financial advice to businesses and members of the public through large branch networks. Jobs in retail banks are predominantly customer-facing, such as working as a cashier, financial adviser, small business or branch manager.

Corporate banking: Corporate banking provides financial services tailored to meet the needs of larger companies. Commercial banking requirements can be quite different when compared with small businesses, as the volume, size and complexity of transactions are significant and therefore potentially riskier.

Front Office

The front office deal with customers, products and are responsible for the production of the company. Activities can include merger and acquisition, professional analysis of companies and equity and investment strategy formulation.

Asset Management

Asset management is the professional management of assets or investments for a wide range of clients including government agencies, pension funds and companies and collective or pooled schemes such as investment trusts, ISAs and mutual funds.

Middle Office

Services in the middle office include treasury, compliance and risk management for professional clients

Legal & Compliance

The financial services industry is highly regulated with local and international laws and regulations so legal experts are required to oversee projects and consult on issues which may impact upon the business.

Compliance officers are responsible for implementing internal policies reflecting the 'rules' of the industry and also ensure the organisation's practices are sound and ethical.

Risk Management

Risk management is about the identification, assessment, prioritisation and management of risks that can arise in an uncertain environment. Some risk managers work within trading and investment banking areas where statistics and financial modelling help to set trading limits and constraints, while others focus on risk management of new or large projects, planning for business continuity in the event of a disaster and managing technology risks.

Financial Planning

Financial planning involves interviewing a customer to discover not only their financial goals but also whether these are achievable given the estimated level of income and other factors or constraints such as debts owing, dependents to provide for, health, age, and tolerance to investment risks.

Insurance

Insurance brokers analyse clients' needs and negotiate the best deal with insurance companies.

This could be for individuals or for businesses. Within the insurance industry there are lots of opportunities. These range from highly specialised, analytical roles to general business management.

Accounting

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

Back Office

The back office provides support and administration to enable a bank's services to run smoothly. Activities can include processing, settlement and reporting of trades, investment portfolio valuation and performance analysis, IT support and project management.

HR and Training

HR and training teams are responsible for hiring, developing and rewarding employees to their full potential, as an institution is only as good as its staff.

Operations

Operations is the back-office function responsible for overseeing the life cycle of a transaction - from the initial preparations such as booking trades for traders to post-trade processes in settlements.

Administrative roles are many and varied. Roles can include working in a call centre to support customers or supervising the administration and performance measurement of investment portfolios.

PR & Marketing

The financial services industry is a competitive market, so organisations need to ensure as well as maintaining their customer base, they are growing their business too. Public Relations, communications and marketing teams are tasked with projects which develop a strong brand for the firm and maximize awareness for the company.

IT

Technology roles are critical in an industry which has grown through heavy investment in computing and communications.

Roles are available in IT support, programming, project development and management, analysis and systems administration.



Get Into Finance

what growth will you talk about?

Financial growth is essential for business success. It allows companies to invest in new technologies, expand their market reach, and improve their operational efficiency. A strong financial foundation is the key to long-term success in any industry.

Investment in research and development is crucial for staying ahead of the competition. It enables companies to develop innovative products and services that meet the needs of the market. This investment is often the most significant driver of financial growth.

Efficient capital management is another key factor in achieving financial growth. Companies should focus on reducing costs, improving their working capital, and optimizing their debt structure. These strategies can significantly impact the bottom line.

Finally, a strong leadership team is essential for driving financial growth. Leaders should set clear goals, communicate effectively, and foster a culture of innovation and collaboration. This leadership is the driving force behind a company's success.

By focusing on these key areas, companies can position themselves for long-term financial growth and success. It's about making smart investments and managing resources effectively to achieve the company's vision.

Financial growth is not just a goal; it's a continuous process. Companies should regularly review their financial performance and adjust their strategies as needed. This ongoing effort is what leads to sustained success.

In conclusion, financial growth is the lifeblood of any business. It's the result of smart decisions, strategic investments, and effective leadership. Companies that prioritize these elements will thrive in the competitive market.

Remember, financial growth is a journey, not a destination. Stay focused, stay innovative, and you'll reach your goals. The future is bright for those who invest in their financial future.

Thank you for your attention. I look forward to discussing these topics further with you. Let's work together to drive growth and success for our organizations.

Best regards,
[Name]

Contact: [Phone Number]
[Email Address]

Follow us on LinkedIn: [Link]



Opportunities for Schools and Colleges

Embed financial services qualifications into your teaching curriculum

We offer your sixth form students...

- ✓ Industry recognised professional qualifications
- ✓ Student membership of a professional body
- ✓ Practitioner engagement through our links with local financial services organisations
- ✓ Free career insight days and work experience
- ✓ UCAS points
- ✓ Direct pathway into apprenticeships in banking and finance
- ✓ An introduction to the world of investment
- ✓ A head start when applying for a job within the financial services industry

We offer your teachers...

- ✓ Flexible teaching structure, with qualifications ranging from 80 to 360 GLH
- ✓ Free teacher training, comprehensive teaching support and resources

cisi.org/schoolsandcolleges



CISI & Investment 2020 Insight Day, Abderdeen Asset Management, London

Troy da Silva, Evelyn Grace Academy

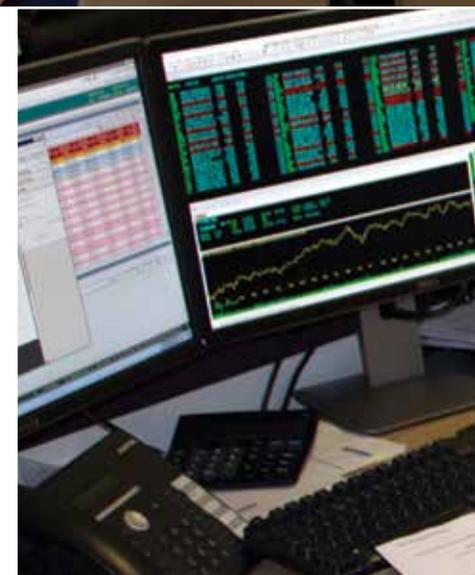
"The event gives you a good insight into the world of finance and opens up more opportunities to students. The best part of the three days was getting to network with new people - both my age and professionals."



Work Experience Placement, Thesis Asset Management, Guildford

Dominic Newman, Investment Assistant, Thesis Asset Management

"Having Charlie and Antonia who were eager, inquisitive and professional students come into the work place with the help and guidance of CISI was fantastic. I enjoyed giving them an insight into discretionary fund management at Thesis Asset Management, but also informing them about the various different aspects, services and roles within the financial industry. This will hopefully help them understand more about this growing sector, answer the questions that they wanted to know and give them the motivation needed to pursue this as a career in the future."



Barclays Insight Day, London

James Lovell, Ark Sixth Form Network Lead, Ark Academies

"Our students have very much enjoyed the experience of engaging with CSI's qualifications, which have provided an excellent vehicle for them to develop understanding of the financial services sector. CSI's employer links have also offered students various great opportunities and experiences that have provided further career insight, deepened their understanding and also enhanced their applications for university and work."



CISI & Investment 2020 Insight Day, JP Morgan, London

Chris Ewart, Head of Careers, Wellington College

"It is very important for those leaving school and going on to university to start to explore career possibilities. The course helps pupils to understand the broad spectrum of career opportunities in the financial sector and that being an "investment banker" is only one option. Pupils quickly become excited about what the future may hold for them which often results in enthusiastic independent research into a variety of financial careers to identify what area they may be best suited to as well as areas that are not to their liking."





UNIVERSITY OF
BIRMINGHAM



ICMA Centre



CISI Educational Trust Awards

Our Awards celebrate excellence amongst undergraduate and postgraduate level students studying CISI accredited courses at CISI Centres of Excellence. The purpose of the Awards is to support the ambitions of each winner as they progress into a career within the finance industry. Recipients are selected based on excellence in university projects or examinations and are invited to submit an essay for the opportunity to attend an interview with senior financial services practitioners. The interview day offers the students a visit to the CISI offices and networking with practitioners and the opportunity to achieve an additional award at the discretion of the Trust.

Mariyan Dimitrov

MSc in Investment Management, Cass Business School

Private Equity Analyst for AltAssets, London

CISI Educational Trust Winner

“My CISI membership provides me with a great source of professional knowledge through the online professional refreshers and CISI TV. This has been particularly useful in helping me stay up to date with regulations and changes in the investment industry, which is vital for a young professional. I have also attended a CISI event which was extremely informative with experts in the field speaking. It was also a good opportunity for me to meet other professionals in the finance sector and build my contact base of others with a passion for the same area.”



Opportunities for Universities

Embed professional-level financial services qualifications into your teaching curriculum

Becoming a CISI partner university is an undeniable marker of excellence to students and the academic world and shows that you are committed to maximising the employability of your graduates.

We offer...

- ✓ Industry recognised professional qualifications for students studying accredited finance programmes, including qualifications mandated by the financial services regulator for those advising retail clients
- ✓ Student membership of a professional body, with the option to upgrade to Associate membership
- ✓ Practitioner engagement through our links with local firms
- ✓ Soft skills training
- ✓ A head start when applying for a job within the financial services industry



Deepak Lalwani Idnani
Postgraduate, University of West of England
CISI Educational Trust Winner

“With significant competition for the best finance sector opportunities, being part of this initiative will help me to stand out from the crowd. The whole experience was incredibly rewarding for me. It gave me the opportunity to meet talented senior people from the industry.”

cisi.org/universities

Become a CISI Education
Centre and connect your
students to a career in
financial services

To find out more, please contact the
CISI Education Development Team

+44 20 7645 0714

educationdevelopment@cisi.org

cisi.org/education





The Financial Services Industry offers a wealth of career opportunities...



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cisi.org/education