

LAURIER **Career Development Centre**

Resumés for Finance Careers

2009-2010

Like any other marketing tool

Member FDIC



**We make money
with you,
not off you.**

Introducing Ally. A bank that believes banking took a wrong turn somewhere with fees and penalties. A bank that believes in a quaint concept: it's your money, not ours. That's why we offer the most competitive rates in the country, we never hide behind fine print and we give you 24/7 access to a real human. Why? It's just the right thing to do.

ally
Straightforward.



STEVE WOOD

s.wood@hotmail.com

Home:
321 Toronto Avenue,
Woodstock Ontario, 2T2 T2T
(519) 432-1234

School:
20 University Blvd
Waterloo, ON N1J 1J1
(Cell) 519-555-7777

Skills

Excellent customer services and the communication skills
Good attention to details and excellent ability to follow directions and procedures
Familiar with computer software including MSoffice and financial software
Strong mathematical skills and excellent analytical abilities
Work effectively with others including co-workers, managers and the general public

Education

2007-2010 Honors B.A. in Financial Mathematics (with Co-op Option) - Minor in Economics
Wilfrid Laurier University
(MA360) Topics in Applied Mathematics (MA340) Introduction to Probability Theory (BU227) Intro to
Financial Accounting (EC370) Microeconomic Theory II

2007 - O.S.S.D Hamburg High School
Helped organize Sit-in for Hunger Spring Event
One of the Top student-athletes grade 11 and 12 Varsity Athletics

Experience

2009-present Customer Services Representative I & II Canada National Bank (Co-op)

- Worked with customers to identify financial and investment options
- Gathered financial data and information and co-presented information to the public
- Processed and reviewed financial statements
- Provided general office assistance including database entry and file management

2007-2008 Construction Coordinator/Framer, Woodstock Renovators

- Maintained a safe job site by learning and following procedures
- Designed cathedral front walls, including calculating the angles required

2006-2007 Parks and Recreation, City of Woodstock

- Maintained parks and city properties including cleaning and lawn maintenance

Extra Curricular Activities

Canadian Securities Course - Completed 2009
Wilfrid Laurier University Finance Club
Curling Assistant coach, Waterloo Region

My hobbies include reading, playing chess and sports

References Available

STEVE WOOD**CSC, (H)BA CANDIDATE 2010**

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<http://www.linkedin.com/in/SteveWood/>

Call 519.555.777

OBJECTIVE

A solution-focused, analytical and resourceful banking assistant, seeking to advance my career by moving into a role as an Account Manager utilizing the knowledge gained from Financial Mathematics studies as well as professional client relationships and sales management skills

SUMMARY PROFILE

- Proven analytical and problem resolution capabilities as reported by Janet King, Branch Manager, Canada National Bank
- Solid relationship building and management skills enabling the development of long-term client relationships and generating client recommendations and referrals
- Skilled mathematician with an outstanding ability to see patterns in data and use this information to anticipate market trends and make appropriate portfolio decisions
- Efficiently managed projects by ensuring appropriate balance of time for initial research and results review, generating recommendations and completion of administrative tasks
- Familiar with financial/statistical analysis software and financial modeling, risk assessment applications; Proficient with Office for creation of presentations, spreadsheets, reports
- Reputation for determination; received 'Demonstrating Exceptional Salesmanship' award

RELEVANT EXPERIENCE

Client Assistant Officer, Customer Service Representative I & II (Co-op) 2009 - present
Canada National Bank, Waterloo, Ontario

- Meet or exceed sales targets on a consistent basis
- Built and maintained client loyalty by learning client's names and individual situations
- Obtained a perfect score of 10 in performance categories including relationship with others, meeting deadlines, and teamwork during most recent review

Committee Member, Wilfrid Laurier University Finance Club, Waterloo, Ontario 2008 - 2009

- Researched and presented a market overview on various stocks
- Co-managed a portfolio of 10 - 15 stocks which out performed the TSX for over a year

EDUCATION AND PROFESSIONAL DEVELOPMENT

Honours Bachelor of Arts, Financial Mathematics with Co-op Option May 2010
Wilfrid Laurier University, Waterloo, Ontario (Minor in Economics) A- (GPA)
Canadian Securities Course - Completed in 2009

ADDITIONAL EXPERIENCE

Assistance Coach, Minor Curling Association, Waterloo Region 2007 - Present
Construction Co-ordinator/Framer, Woodstock Renovators, Woodstock, ON 2007 - 2008

INTERESTS

Enjoy reading the Business news, mastering chess, playing squash and weight training

*"A great asset
to our
branch!"*

*"A key
contributor
...to branch
sales growth."*

*"Proven
commitment to
our core
values."*

*"An active
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problems,
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Janet King,
Branch
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*"I've dealt
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Client
comment,
reported by
Supervising
Account
Manager

WHAT DOES YOUR RESUMÉ SAY ABOUT YOU

There are
Different
Types of
Resumés

Paper Resumés
Virtual Resumés



**Electronic
Visual
Video**

Our Goal
in this
workshop

**To demonstrate the
underlying
components of an
effective resumé of
any type**

Each of these
Formats will
say something
about who you
are to an
employer

3 PARTS OF AN EFFECTIVE RESUMÉ

Part I

Aesthetics

Part II

Structure

Part III

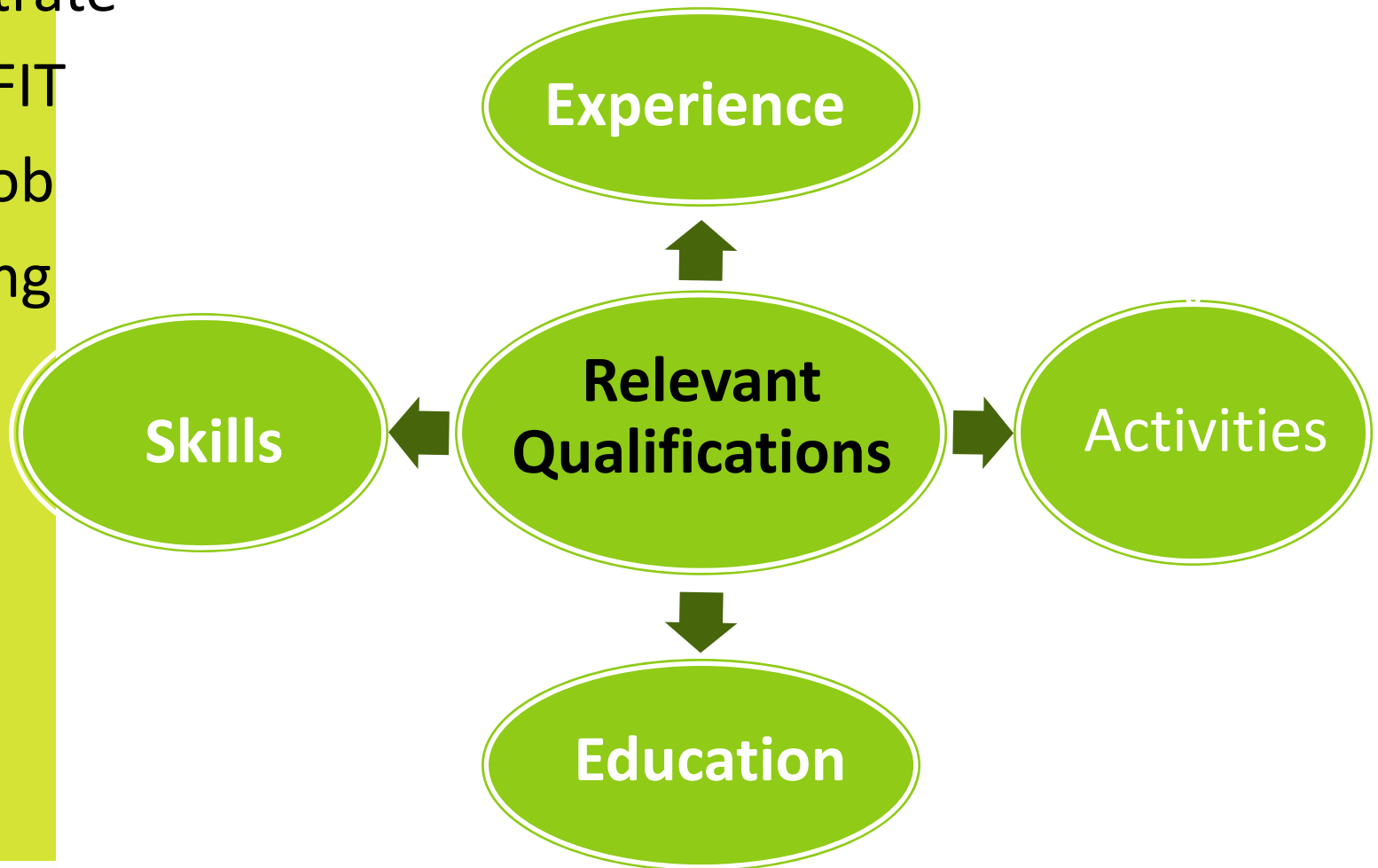
Content

**Effective
Resumé**

PRIMARY GOAL OF YOUR RESUMÉ

To
Demonstrate
your FIT
for a job
opening

Your Resumé Needs to Summarize Your



WILL THE EMPLOYER READ IT!

How long do you think your resumé has to make an impression?

You have to pass through each step before you get the interview

3 Steps to resumé screening

First Impression
5 Seconds

Second Look
15 seconds

Content Review
30+ seconds

KEY AESTHETICS COMPONENTS

Please
take out
your
pen

Compare
Resumé
1 & 2

- ⊙ Attractive/Appealing
- ⊙ Industry/company style
- ⊙ Clear contact information
- ⊙ Easy to read (font size, not crowded)
- ⊙ Headings easy to locate
- ⊙ Sections stand out
- ⊙ Consistent in appearance
- ⊙ Professional/Modern
- ⊙ Error free

Be
prepared
to discuss

COMPARE FOR AESTHETICS

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EDUCATION

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Wilfrid Laurier University, Waterloo, Ontario, A- Overall GPA
Minor in Economics
Relevant Courses: Financial Analysis, Business Management, Global Economic Trends

May 2010

EXPERIENCE

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2009 - present

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- "A great asset to our branch! . . . An active listener able to resolve problems, earning him admiration from clients." Janet King, Branch Manager

Construction Co-ordinator/Framer
Woodstock Renovators, Woodstock, Ontario
2007 - 2008

- Directed the efforts of a team of 2 - 4 construction workers
- Maintained a safe job site through clear and ongoing communication with site team
- Designed cathedral front walls, including calculating the angles required

CONTINUED ON PAGE 2

Resume
#2

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STEVE WOOD

PAGE 2

EXPERIENCE CONTINUED

Landscaping Maintenance 2006 - 2007
Parks and Recreation Department, City of Woodstock

- Maintained parks and city properties including cleaning and lawn maintenance

ADDITIONAL TRAINING

Canadian Securities Course - Completed 2009
Coaching Level 1, National Coaching Certification, Canadian Coaching Association, 2008

ADDITIONAL ACTIVITIES

Assistant Coach 2007 - present
Minor Curling Association, Waterloo Region

- Assisted youth to learn the basics of curling
- Planned coaching sessions, motivate and support youth

Committee Member 2007 - 2008
Wilfrid Laurier University Finance Club

- Researched and presented a market overview on various stocks
- Co-managed a portfolio of 10 - 15 stocks, which out performed the TSX for over a year

INTERESTS

Enjoy reading the Business news and reading business blogs
Amateur Chess player
Play sports including squash (compete in local squash tournaments) and weight training

PORTFOLIO AND RECOMMENDATIONS AVAILABLE

Resume
#2

Structure

B
u B
i l
l o
d c
i k
n s
g

The impact of **Selection, Organization** and information **Presentation** on the effectiveness of your resumé

Name the common sections of a resumé

- Education
- Experience
- Achievements and/or Awards
- Volunteer Activities
- Interests
- Skills

**TARGETING
IS KEY**

KEYS TO STRUCTURE

Begin with your general/baseline resumé

4 Keys to begin targeting your resumé

- ⊙ Ensure your resumé contains all necessary and relevant information
- ⊙ Reader must be able to quickly find desired information
- ⊙ Minimize irrelevant information
- ⊙ Draw attention to most relevant information

Review

Resume #3

Then,
have a
**job
target**
in mind
as you
create
new
targeted
resumé

Resume #3

Appearance

An Objective

Added Sections

Moved and removed information

Changing in wording

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"Proven commitment to our core values."

"An active listener able to resolve problems, earning him admiration from clients."

Janet King,
Branch
Manager

"I've dealt with quite a few people at this branch and (Steve) was the first person to actually come up with a solution to the problem."

Client comment, reported by Supervising Account Manager

OBJECTIVE

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Construction Co-ordinator (Framer, Woodstock Restorers, Woodstock, ON 2007 - 2008)

INTERESTS

Enjoy reading the Business news, mastering chess, playing squash and weight training

Education Information

Name school, city, province
(country if outside Canada)

What about high school?

What about listing courses?

What about the GPA?

What about listing Awards?

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INTERESTS

Enjoy reading the Business news, mastering chess, playing squash and weight training

Experience Information

Job Details

Relevant = More Details

Focus on Achievements and Skills, not duties

Activities and Interests

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INTERESTS

Enjoy reading the Business news, mastering chess, playing squash and weight training

ADDITIONAL SECTIONS

What additional sections might appear on a resumé ?

- ▶ Professional Development
- ▶ Affiliations (like the CFA)
- ▶ Community/Volunteer & Extra Activities
- ▶ Awards/Achievements
- ▶ Presentations/Papers/Conferences

WHAT ABOUT PERSONAL DETAILS

What about personal details?

When would you include personal details?

- Date of birth
- Gender
- Marital/Family Status
- Disability information
- Country of Origin and/or Citizenship
- Ethnic background
- Languages spoken
- Religion

This varies by Country so do your homework

Target with your message

What you say and how you say it impact on the message you are sending the potential employer

- Use your **Objective** to focus the résumé
- Use your **Profile** to provide a big picture or snap-shot
- Other information 'back's up' how and from where you obtained your skills and qualifications

The Objective

Alter the wording to connect with a specific job and demonstrate FIT

The Summary

Draw attention to the most relevant qualifications and information

5 Main Components

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5 Main Components

1. Experience Statement

2. Skills Statement

3. Achievement Statement

4. Qualities

5. Bonus

SELLING YOUR SKILLS

1. Experience Statement

Do not simply say:
Customer Service Experience'

Experience providing financial information to customers to assist with decision making

No Relevant Experience?
Sell Applied Knowledge

'Solid knowledge and training in . . . field research and analysis'

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- Built and maintained client loyalty by learning client's names and individual situations
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ADDITIONAL EXPERIENCE

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INTERESTS

Enjoy reading the Business news, mastering chess, playing squash and weight training

2. Skills Statement

Select 2 – 4 relevant skills
(check the job description)

Describe how you will or
how you have USED the
RELEVANT skills

Demonstrate
You UNDERSTAND
the job and can
DO the job

STEVE WOOD

CSC, (H)BA CANDIDATE 2010

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http://www.linkedin.com/in/SteveWood/

Cell 519.555.777

"A great asset
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"A key
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...to branch
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"Proven
commitment to
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"An active
listener able
to resolve
problems,
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Janet King,
Branch
Manager

"I've dealt
with quite a
few people at
this branch
and (Steve)
was the first
person to
actually come
up with a
solution to the
problem."

Client
comment,
reported by
Supervising
Account
Manager

OBJECTIVE

A solution-focused, analytical and resourceful banking assistant, seeking to advance my career by moving into a role as an Account Manager utilizing the knowledge gained from Financial Mathematics studies as well as professional client relationships and sales management skills

SUMMARY PROFILE

- Proven analytical and problem resolution capabilities as reported by Janet King, Branch Manager, Canada National Bank
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- Skilled mathematician with an outstanding ability to see patterns in data and use this information to anticipate market trends and make appropriate portfolio decisions
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5 Main Components

3. Achievement Statement

4. Qualities

5. Bonus

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ADDITIONAL SUMMARY OPTIONS

You may include specific **Skills** sections such as

- Targeted Skills Section
- Key skills or additional skills

Summary

Short 2-3 line profile

Finance Skills

2-4 lines highlighting relevant targeted skills

For
Example

Changing Job Descriptions to better target a job

Focus on what is relevant for the employer to know and what adds value

Remove details that do not relate or draw attention away from target job

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ALTERNATE FORMAT RESUMÉS

Create a basic resumé first and apply to other formats

Electronic resumés

Be aware of the software used by the employer – default to PDF if unsure. See tips for submitting resumes electronically on our web site.

Virtual resumés

On-line creations such as a web site or e-resume hosting site (i.e. <http://www.visualcv.com>)

Video resumés

Submit directly or post online

<http://www.youtube.com/watch?v=Ot4K-KCLAqs>

FOCUS ON THE FUTURE JOB

Your Resumé should Draw attention to what is relevant for a specific job

Your Resumé should Highlight :

How your experiences (education, jobs, training, volunteering, extracurricular activities)

Have enabled you to **gain the relevant**, transferable skills and experiences

To make you **a viable candidate** for the job

ANY QUESTIONS?

LAURIER **Career Development Centre**

Check out our [careerchatter](#) Blog

Link to us through [Linkedin](#)

Follow us on [Twitter](#)

Thank you for your interest