



# NEW AGE FINANCE CAREERS



## CHARTERED FINANCIAL ANALYST (CFA)

The CFA designation is highly sought after by finance professionals around the world. It consists of three levels and takes an average of about 4 years to complete all 3 levels. It is widely regarded as one of the top finance certifications.

## CHARTERED ACCOUNTANT (CA/ CPA)

A chartered accountant is the most highly qualified accountancy professional in many countries across the world. The term refers to professional accountants whose qualifications give them the authority to carry out specific activities in the accountancy spectrum.





## **CFO (CHIEF FINANCIAL OFFICER)**

A Chief Financial Officer (CFO) is a senior executive responsible for managing the financial actions of their company. They are often in charge of tracking cash flow, analyzing strengths/weaknesses in the company's finances and overseeing all aspects of its financial success.

## **CMA (CERTIFIED MANAGEMENT ACCOUNTANT)**

A CMA is an expert in corporate finance and management accounting. Their particular niche is using financial and accounting data and knowledge to inform business strategy. As the IMA puts it, "CMAs can explain the 'why' behind numbers, not just the 'what.'"





## CHARTERED ALTERNATIVE INVESTMENT ANALYST (CAIA)

The CAIA certification is focused on alternative investments and geared toward professionals in the asset management and hedge fund industries. The main topics covered in the CAIA are ethics, hedge funds, private equity, real assets, structured products, asset allocation, and risk management. CAIA is one of the top finance certifications.

## INVESTMENT BANKER

Investment banks help companies and governments raise money through bonds, stocks, public offerings, venture capitalism, and mergers and acquisitions (M&A).





## FINANCIAL RISK MANAGER (FRM)

The FRM certification is designed for professionals pursuing careers as risk officers, risk analysts, and other positions in risk management. The cost of the designation is about \$1,500 and takes approximately a year to complete.

## FINANCIAL MODELING & VALUATION ANALYST (FMVA)

The Financial Modeling and Valuation Analyst (FMVA) certification is a professional qualification that aims to teach professionals how to practically apply financial theory. Professionals who earn this certification learn a variety of practical and technical skills related to finance and financial modeling.





## PUBLIC ACCOUNTANT

Finance, as a broad industry, comprises recording and maintenance of the flow of money throughout for a public or private company. Public accountants are responsible for creating an ecosystem that helps companies cut down on expenses, improve financial health and enhance the overall revenue

## CORPORATE FINANCE MANAGER

The Corporate Finance Manager supports all of the the business's finance issues, inspiring the finance department in identifying and generating new revenue streams, acting on potential opportunities, negotiating deals, and leading pitches.





## COMMERCIAL BANKER

Commercial Banking offers multiple roles but requires different skill sets for each type of career option. The most promising ones are account manager, trust officer, bank teller, credit analyst and branch manager.

## PORTFOLIO MANAGER

Portfolio management is a fusion of commerce and science as it requires knowledge of business, mathematics, and analytics. As a portfolio manager, you do not pore over individual investments but look at the overall investment mix of your clients, who may be institutions or individuals.





## COMPLIANCE AND INTERNAL CONTROL

Compliance services engage managers and administrative officials to ensure that all procedures and activities adhere to applicable laws, ethical practices, and standards. Companies want to avoid any harm to their reputation and finances on account of regulatory non-compliance.

## DIGITAL BANKING MANAGERS

The banking business has teamed up with digital technology, providing better and faster services to their customers. While millennials welcomed it when it came into existence, now, after the COVID-19 pandemic broke out.







## COMPANY SECRETARY

A Company Secretary is a senior position in a citizen sector establishment. Also known as Compliance Officers, it is one of the positions that is a part of the key managerial personnel (which usually includes the CEO & CFO) of any company.

## COST ACCOUNTANT

A Cost Accountant makes sure that the finances of an organization run smoothly. They focus on developing and maintaining adequate budgets, which include costs associated with operations such as employee benefits or marketing campaigns.



## FINANCIAL PLANNER/ CONSULTANT

Individuals and companies require the services of financial planners to secure their current and future financial stability. A career in financial planning would entail reviewing financial statements and cash flows and creating methods for saving and investing in matching the clients' needs.



## FINANCIAL MANAGER

Companies which have high net worth and regular financial transactions, requires a financial manager who can manage the finance of the company strategically. If you have a keen eye to analyse various financial and economic market trends that will help the company to maximise its profit than there you are!



## FINANCIAL ANALYST

A financial analyst is responsible for researching and giving financial recommendation to his clients or an organisation. A job of a financial analyst is to interpret data such as market trends, calculate risks and predict financial status of his client or organisation.

## FINANCIAL SALES AGENT

Companies and people who have interest in purchase and selling of financial securities, your knowledge will be of great help for them. The job of a financial sales agent involves assisting clients and trading on their behalf, or helping secure capital by finding buyers for bonds or stock.





## FINANCE PROJECT MANAGER

A finance project manager ensures that employees execute projects on a stipulated budget. They assign a cost to several areas of the project and balance a company's budget to suit its long and short-term goals.

## FINANCIAL EXAMINER

If your interest lies in the ethical component of the business, then a job of a financial examiner will be a good for you. They are tasked with checking a company is compliant with laws and regulations governing financial and securities institutions and financial and real estate transactions.





## ACTUARIAL ANALYST

Actuarial analysts use statistical models to analyze data and assess risk. They are employed in many industries, particularly in insurance, to utilize their knowledge and skills to design and price insurance policies.

## FINANCE RESEARCH ANALYST

Research Analyst is one of the most important profiles in the Finance industry. Within a company, they could be in a number of departments with a number of different job titles.





## TREASURY MANAGER

Reviewing funding needs, monthly reporting of all treasury activities to senior management. Analysing and performing appropriate hedging and funding activities (Forex, swaps, loans, deposits, etc.) Cash and liquidity management through cash flow planning and forecasting.

## WEALTH AND PORTFOLIO MANAGER

Wealth Management consists of creating investment portfolios, retirement planning funds, tax planning, financial planning, and so on. Portfolio management is basically matching financial objectives to the investments.





## MERCHANT BANKER

Merchant Banking is a combination of consulting and banking services, that consists of giving financial advice to big companies. Professionals provide fee-based advice services for mergers and acquisitions, issuing letters of credit, trade consulting, and syndicate financing in projects among other services they provide.

## ASSET MANAGER

Asset management is a systematic approach to the governance and realization of value from the things that a group or entity is responsible for, over their whole life cycles. It may apply both to tangible assets and to intangible assets





## ECONOMIST

Economists are ubiquitous at a variety of finance-related institutions. Investment banks, asset management companies, and central banks employ economists, as do government agencies and academic institutions.

## ECONOMIC STRATEGIST

There is a fine line between a strategist and an economist. Economists tend to focus on the broad economy while strategists home in on the financial markets. Strategist jobs are more likely to be found at banks and money management companies than academic and government institutions.







## INVESTMENT ANALYST

Investment analysts typically specialize in one or more areas, including geographic locations, industrial or economic sectors, or types of investment vehicles. Analysts who work for sell-side companies usually put out buy-and-sell recommendations for clients.

## ECONOMIC ANALYST

Economic analysts observe broad areas of the economy and the markets to look for major trends. These jobs appeal to individuals who enjoy analyzing data, tracking trends, and making opinions based on those trends regarding the future of financial markets.





## SECURITIES TRADER

Securities traders work at commercial banks, investment banks, asset management firms, hedge funds, and more. Wherever they work, traders buy and sell securities on behalf of the assets managed by that firm.

## STOCK BROKER

Similar to investment banking, stock broking is a highly respected and lucrative career option after studying finance. Stocks, or small shares in companies sold by the corporation, are a popular (albeit slightly risky) investment option with a potential to earn hefty sums.





## LOAN OFFICER

Loan officers assess an applicant's ability to pay back a loan through a process known as underwriting. Officers look through financial documents and apply a formula to assess the likelihood of loan repayment.

## BUDGET ANALYST

Budget analysts are found in boardrooms rather than in banks, working closely with an organization's staff to craft a budget. The analysis portion takes place when analysts review managers' budgets to make sure they add up.





## MARKET RESEARCH ANALYST

Companies require market research analysts to collect and compile consumer and competitor data. In the stock market, a research analyst may research the performance history of a company or its stock to help a buyer make an investment decision.

## COMMODITY TRADERS

A commodity trader is an individual or business that invests in physical substances like oil, gold, or agricultural products. Daily buying and selling are driven by expected economic trends or commodity market opportunities.





## MUTUAL FUND ADVISOR

MF Advisor is to give unbiased and exact information about various mutual fund schemes. This includes information about the historical returns data, portfolio allocation of the fund, assets under management, Net Asset Value etc.

## MUTUAL FUND MANAGER

A fund manager is responsible for implementing a fund's investment strategy and managing its trading activities. They oversee mutual funds or pensions, manage analysts, conduct research, and make important investment decisions.





## ACCOUNTS PAYABLE SPECIALIST

An accounts payable specialist handles the AP—the bills or liability—for an organization. This person makes sure that bills are accurate and paid on time and that any invoices received are authorized. This is critical to the health of the company as it impacts budget and cash flow.

## PURCHASE EXECUTIVE

Purchasing Officer responsibilities include evaluating vendors, negotiating contracts and preparing reports (e.g. on orders and costs.) For this role, you should have good knowledge of market research, along with solid analytical skills to make sure you're identifying the most profitable offers.





## FINANCE ANALYTICS

Financial analysts are responsible for a variety of research tasks to inform investment strategy and make investment decisions for their company or clients. These roles are data-intensive and require strong mathematical and analytical skills.

## MARKET RISK MANAGER

Risk managers work with companies to identify and assess the potential risk that can hinder a company's reputation, security, safety and financial prosperity of their organisation.



## PRODUCT MANAGER



A product manager is the person who identifies the customer need and the larger business objectives that a product or feature will fulfill, articulates what success looks like for a product, and rallies a team to turn that vision into a reality.

## ACCOUNTS ASSISTANT/ ACCOUNTANT

Accounts assistants supply administrative support to accountants by performing clerical tasks such as filing, handling mail, making phone calls, replying to emails and basic bookkeeping.







## BANK TELLERS

Provides account services to customers by receiving deposits and loan payments, cashing checks, issuing savings withdrawals, and recording night and mail deposits. Sells cashier's checks, traveler's checks, and series e bonds.

## BANKING ASSISTANT

Provide banking assistance to bank customers in handling their deposits and payments. Assist and support bank administration in its operational issues. Gather and analyze financial and related data of customers. Assist customers in handling their deposits and check payments.





## CORPORATE BANKER

Business banking is also called commercial or corporate banking. Banks provide financial and advisory services to small and medium businesses as well as larger corporations. These services are tailored to the specific needs of each business.

## BANKING OFFICER

Managing client bank accounts, including opening and closing accounts, and overseeing transactions. Processing deposits, payments, and withdrawals. Authorizing and evaluating overdrafts and loans. Handling other transactions, such as writing cashier checks or money orders, when necessary.





## BANK PROBATIONARY OFFICERS

A Bank PO has to work as a Public Relations Officer, handle customer complaints and address various customer related issues. It also includes managerial work such as supervising the employees under the Clerical cadre. Managing cash flow, loans, mortgages and finances.

## RETAIL BANKER

Retail banking is a way for individual consumers to manage their money, have access to credit, and deposit their money in a secure manner. Services offered by retail banks include checking and savings accounts, mortgages, personal loans, credit cards, and certificates of deposit (CDs).





## MICRO FINANCE PROFESSIONALS

Microfinance is a banking service provided to unemployed or low-income individuals or groups who otherwise would have no other access to financial services. Microfinance allows people to take on reasonable small business loans safely, and in a manner that is consistent with ethical lending practices.

## NEW ACCOUNTS CLERKS

New accounts clerks work for banks and investment firms, interviewing people who want to open new accounts. They go over available services with prospective customers, and help them fill out applications. They also investigate and correct errors in accounts.





## INSURANCE COORDINATOR

An insurance coordinator typically works in the health care industry and helps to determine what insurance benefits are available to patients. As an insurance coordinator, you confirm coverage with the insurance company, review benefits with patients, and submit claims for payment.

## SR. ASSURANCE ASSOCIATE

A Senior Assurance Associate will work collaboratively with the members of a growing team. As a senior assurance associate this position will be responsible for completing client engagements, while developing strong working relationships with clients built around understanding their business and challenges.





## INSURANCE SALES MANAGER

An insurance sales manager determines the number of policies that should be sold during a certain period and oversees the sales team's progress in meeting goals. Insurance sales managers provide strategies for increasing sales, feedback, and developing marketing campaigns.

## INSURANCE ADVISOR

An insurance advisor provides financial advice to clients on retirement planning, investing, and protecting against risks. Insurance advisors complete a financial needs analysis with clients, which includes assets and liabilities, tax status, existing insurance and risk analysis.





## LIFE INSURANCE SPECIALIST

They analyze and process contracts and other documents, develop compliance and audit procedures, and prepare reports and other materials. They monitor critical policy changes and confirm any necessary adjustments are implemented to ensure compliance.

## INSURANCE SALES

Insurance Sales Representative is a person who sells insurance policies. Insurance Sales Representative calls and meets with clients and potential clients to grow their customer base.



## INSURANCE PRODUCT MANAGER

Insurance product managers set and direct the development of new insurance products, following the product lifecycle policy and the general insurance strategy.



## EQUITY ANALYST

Equity analysts assess a company or stock's performance history and analyse market trends to predict its performance for future periods. They use their specialised knowledge and understanding of finance to help clients make informed decisions relating to transactions and investments.







## RELATIONSHIP MANAGER

Relationship Managers (RM) are mapped to Clients to service, manage and deepen client relationships. The RM is responsible for managing the entire Banking and Financial needs of the customer as a Single Point of Contact from the Bank.

## TAX CONSULTANT

The primary role of a tax consultant or a tax advisor is to help people and organizations in paying their taxes. They hold expertise in tax law, tax compliance, and tax planning. Both individuals and business owners can hire a tax consultant for long and short-term tax optimization.





**THANKS**

**BEST OF LUCK FOR YOUR  
BRIGHT FUTURE!!**

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