

FINANCE CAREER TIPS

by Nicolas Boucher



FP&A / CONTROLLING

FINANCIAL PLANNING & ANALYSIS MANAGER

Manages FP&A Team and report to management

FP&A ANALYST

Analyzes financial data to support business decisions

REPORTING ANALYST

Develops and produces reports on a company's performance.

FINANCIAL REPORTING MANAGER

Manages a company's financial reporting process

BUSINESS INTELLIGENCE ANALYST

Analyzes data and develops insights to support business decisions

DATA ANALYST

Collects, cleans, and analyzes data to support business decisions.

COMMERCIAL CONTROLLER

Analyzes and manages a company's sales and marketing activities

PROJECT CONTROLLER

Analyzes and manages the financial aspects of a project

COST ESTIMATOR

Calculates the cost of producing a product or service

RISK MANAGEMENT & COMPLIANCE

INTERNAL AUDITOR

Ensures a company's financial and operational processes are efficient and effective

FINANCIAL COMPLIANCE OFFICER

Ensures a company complies with financial regulations

RISK MANAGER

Identifies and mitigates potential financial risks for organizations

INTERNAL CONTROL MANAGER

Ensures a company's compliance with internal control procedures

ACTUARY

Analyzes financial risk using statistics and modeling techniques

CREDIT ANALYST

Evaluates creditworthiness of clients or companies

INVESTMENT MANAGEMENT

MERGERS & ACQUISITIONS (M&A) ANALYST

Analyzes potential acquisitions or mergers for a company

INVESTOR RELATIONS MANAGER

Communicates with investors & analysts about a company's financial performance

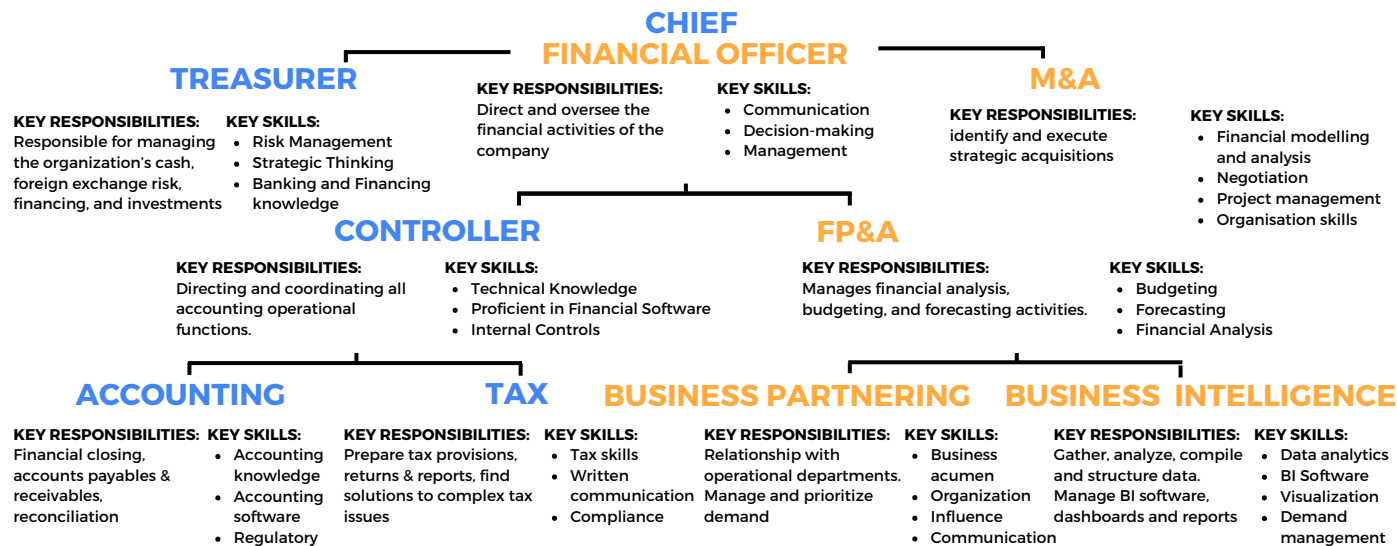
PORTFOLIO MANAGER

Manages a portfolio of investments for an organization

FINANCIAL ANALYST

Analyses securities and provides reporting

FINANCE ORGANIZATION CHART



FINANCE & ACCOUNTING

CHIEF FINANCIAL OFFICER (CFO)

Developing & implementing financial strategies & policies, overseeing financial functions,

FINANCIAL CONTROLLER

Oversees accounting and financial reporting for a company.

TREASURER

Manages a company's cash flow and investments

ACCOUNTANT

Prepares and maintains financial records for individuals and organizations

TAX MANAGER

Manages a company's tax compliance and strategy

PAYROLL SPECIALIST

Calculates and processes employee payroll

ACCOUNTS RECEIVABLE ACCOUNTANT

Processes incoming payments from customers

ACCOUNTS PAYABLE ACCOUNTANT

Process invoices and deals with suppliers

INVENTORY ACCOUNTANT

Manages a company's inventory and cost of goods sold

AUDIT TO FP&A

TRANSFERRABLE SKILLS

- Strong accounting knowledge
- Structured, efficient and goal oriented
- Work under pressure
- Communication skills
- Ability to adapt to different stakeholders and business situations

WHAT YOU NEED TO LEARN

- Deeper understanding of profitability, price sensitivity, cost accounting
- Learn the key KPIs
- Get the most out of the ERP and reporting tools to deliver efficient & valuable reporting/analysis
- Budgeting, forecasting, modeling
- How to improve processes to be more efficient as a finance function

DIFFERENT FP&A FIELDS

- General Financial planning & analysis
- Commercial controlling
- Project controlling
- Cost controlling
- Industrial controlling
- Reporting

CREDITS TO



Nicolas Boucher

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TOP 20 FINANCE & ACCOUNTING CERTIFICATIONS

FINANCE CERTIFICATIONS

- CFA®** CHARTERED FINANCIAL ANALYST
- CFP™** CERTIFIED FINANCIAL PLANNER
- CAIA®** CHARTERED ALTERNATIVE INVESTMENT ANALYST
- ChFC®** CHARTERED FINANCIAL CONSULTANT
- FMVA®** FINANCIAL MODELING & VALUATION ANALYST
- CMT** CHARTERED MARKET TECHNICIAN
- FRM®** FINANCIAL RISK MANAGER
- CFS** CERTIFIED FUND SPECIALIST
- FPACTM** CERTIFIED CORPORATE FP&A PROFESSIONAL
- AFM** ADVANCED FINANCIAL MODELER

ACCOUNTING CERTIFICATIONS

- CA/ACA** CHARTERED ACCOUNTANT ASSOCIATE CHARTERED ACCOUNTANT
- CPA** CERTIFIED PUBLIC ACCOUNTANT
- ACCA** CHARTERED CERTIFIED ACCOUNTANT
- FCMA** FELLOW CHARTERED MANAGEMENT ACCOUNTANT
- CIA®** CERTIFIED INTERNAL AUDITOR
- CMA®** CERTIFIED MANAGEMENT ACCOUNTANT
- CTP®** CERTIFIED TREASURY PROFESSIONAL
- CFE** CERTIFIED FRAUD EXAMINER
- CGMA®** CHARTERED GLOBAL MANAGEMENT ACCOUNTANT®
- ACMA** ASSOCIATE CHARTERED MANAGEMENT ACCOUNTANT

INTERVIEW QUESTIONS ?

SOFT SKILLS

What steps do you take to ensure everyone is on the same page when it comes to financial planning and analysis?

How do you build trust with the management team to ensure accurate financial reporting?

EXCEL SKILLS

What experience do you have using Excel for financial analysis? How do you use Excel to build financial models?

ACCOUNTING SKILLS

What is your understanding of financial statements?

What are the different methods of accounting (e.g. cash-basis, accrual basis)?

QUALITIES OF A GREAT FINANCE PRO

SOFT SKILLS

1 BUSINESS ACUMEN

Understand business context for informed decisions.

2 FINANCE BUSINESS PARTNERING

Collaborate to drive business results.

3 STORY TELLING

Communicate complex financial information in simple terms.

4 COMMUNICATION

Clear and effective communication for business success.

5 INFLUENCING

Persuasion skills for driving change and achieving goals.

TECHNICAL SKILLS

6 FINANCIAL ANALYSIS

Evaluate financial data for decision-making.

7 BUDGETING & FORECASTING

Plan financials to reach the company's objectives.

8 COST ACCOUNTING

Assign costs using the most relevant method to track profitability.

9 ACCOUNTING PRINCIPLES

Understand and apply accounting practices and standards.

10 IT LITERACY

Manage financial systems and leverage technology.

MOVE TO FP&A IN 8 STEPS

- Relationships**
Get closer to the FP&A team (coffee, lunch, etc)
- Open-up Conversations**
Ask them to explain you what they do and what they are working on
- Spend Quality Time**
Spend one day or 2x half day shadowing FP&A team members
- Use your specialization**
Offer your help on topics you are already covering in accounting
- Offer your help**
As soon as there is a capacity problem in the FP&A team offer your help to take over some tasks
- Be Available**
When somebody leaves the FP&A team, offer directly your help to cover the tasks of the person who left
- Get support**
Get the support of the FP&A manager to apply officially to the position and increase your chances of success!
- GET NOMINATED!**
Get nominated in the FP&A team!

10 CV TIPS

- Keep your CV concise and to-the-point, highlighting your relevant experience and skills specific to finance and the role you target.
- Use a professional and modern template to showcase your personal brand.
- Tailor your CV to the specific job you're applying for, highlighting relevant accomplishments and experience.
- Focus on accomplishments rather than just listing your job duties.
- Include any relevant certifications or professional memberships.
- Keep your CV up-to-date and regularly review and refresh it.
- Include a strong summary statement that showcases your value and sets you apart from other candidates.
- Showcase your technical skills and knowledge of industry-specific software and tools
- Have a professional review your CV before submitting it to potential employers.
- Use action verbs and quantifiable metrics to showcase your achievements and impact.

10 CAREER ADVICES

- Build a strong foundation in finance and accounting principles
- Specialize in a particular area of finance
- Develop strong communication skills
- Seek out mentors and role models
- Take on additional responsibilities
- Be detail-oriented and analytical
- Network and build relationships
- Stay current
- Be proactive
- Be ethical

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