



A Career in Banking: Your Roadmap to Success

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PANELISTS



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AGENDA

- 01** Understanding Roles & Career Pathways in Banking
- 02** Creating a Robust Professional Foundation
- 03** Meeting the Requirements of Financial Institutions
- 04** Q&A





What exciting career opportunities await new graduates in the dynamic world of banking?

Getting Started

While licensing is crucial and opens a lot of doors for new entrants within the financial services industry, there are additional factors that job seekers should consider when it comes to maximizing their chances of landing their first job.



Communication
& Soft Skills



Networking



Customer-facing
Job Experience

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The Institutional/Corporate sector works with large corporations and the government to help manage their short and long-term financing requirements. Short-term financing requirements focus on managing cash/investments and short-term borrowing and lending. Long-term financing requires evaluating and choosing the appropriate instruments to finance capital projects or expansion.

The Retail sector includes roles serving the general public or small business owners, generally in a sales, marketing, advisory or servicing capacity. This sector offers the most significant employment opportunity, encompassing branches of Canada's banks, credit unions, securities dealers, mutual fund dealers and insurance companies. In addition to those who work for an employer, many choose to be independent agents, brokers or financial planners/advisors.



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The Middle Office is the interface between customer-facing branches and the processing department. The middle office primarily includes Risk Management and Compliance roles, along with IT and Marketing. They are responsible for ensuring the business's integrity and managing business risk.



Back Office employees provide administrative support to the organization—including settlements, clearances, transfers, record maintenance and accounting. Their clients are generally internal to the organization they work for. External organizations can occasionally outsource to companies that may not have their back-office facilities.

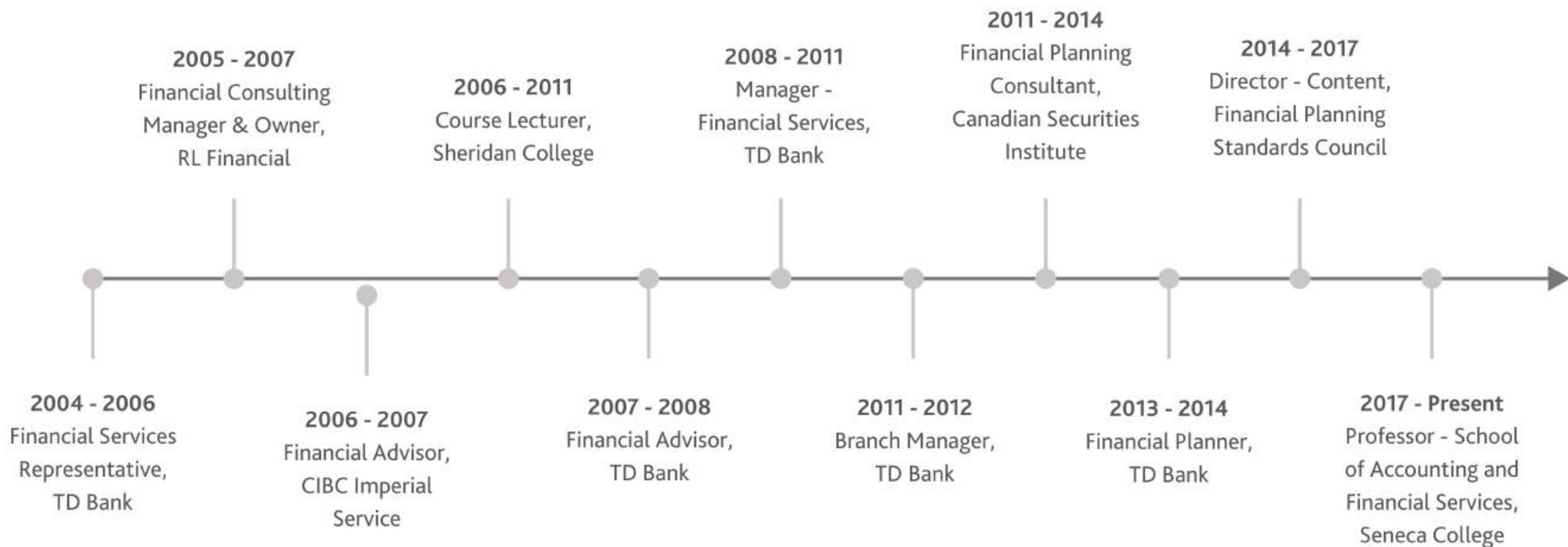
For more details about the various roles available under the different segments in banking, please visit [csi.ca/career map](http://csi.ca/career-map).





How can new graduates pursue and make the most of the opportunities in the dynamic banking industry?

Ryan's Professional Journey



How can new graduates pursue and make the most of the opportunities in the dynamic banking industry?



Communication



Relationship
Building



Certifications



Continuous
Learning



“Opportunity is missed by most people because it is dressed in overalls and looks like work.”

THOMAS EDISON

“Networking is an investment in your business. It takes time and when done correctly can yield great results for years to come.

DIANE HELBIG





“Corporate culture matters. How management chooses to treat its people impacts everything - for better or for worse.

SIMON SINEK



What are financial institutions looking for in potential candidates?

What are some of the ways new graduates can hone their skills in order to fulfill job requirements?

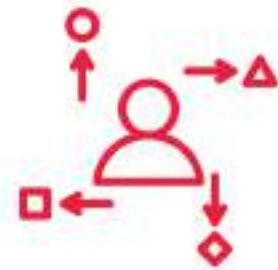
What are financial institutions looking for in potential candidates?



Communication Skills



Teamwork and Collaboration



Adaptability



Analytical and Critical Thinking



Emotional Intelligence



Leadership Potential



Continuous Learning

What are some of the ways new graduates can hone their skills in order to fulfill job requirements?



Mentorship
Programs and
Networking



Side-of-desk
Projects or
Volunteer Work



Participate in
Industry
Competitions



Attend
Workshops and
Conferences



Online
Courses and
Certifications

Q&A



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