Classroom2Career™ SERIES — FIND YOUR PATH. BUILD YOUR FUTURE.

Course Catalog

Everything in the free financial services career program.

100% FREE FOR STUDENTS
No credit card. No subscription. No obligation.

6 INDUSTRY SEGMENTS · **51** VIDEO LESSONS · **4** HOURS OF VIDEO · **45** TOP 30 EMPLOYER LISTS · **7** WORKSHEETS & TOOLS · **1** CAREER ASSESSMENT

STEP 1 Explore Six Industry Segments

43 lessons. Each segment has its own video series and entry-level career guide.

01 Investment Banking & Private Equity

Investment banking, private equity, and the different paths into these highly competitive fields.

1	Introduction to Investment Banking & Private Equity	3:08
2	Investment Banking	4:59
3	Private Equity	3:40
4	Entry-Level Career Guide	4:17
5	AI and Investment Banking & Private Equity	7:02

5 lessons · 23 min — 10 TOP 30 LISTS

02 Consumer Finance & FinTech

Companies and careers shaping consumer lending, payments, and financial technology.

1	Introduction to Consumer Finance	2:32
2	Consumer Mortgage	4:53
3	Consumer Credit Cards	5:20
4	Consumer Auto and Personal Loans	11:09
5	The Consumer Finance Continuum	6:51
6	Consumer Finance — Career Guide	5:55
7	AI and Consumer Finance & FinTech	6:46

7 lessons · 44 min — 8 TOP 30 LISTS

03 Commercial Real Estate & Finance

How the commercial real estate business works and the roles involved in the industry.

1	Introduction to Commercial Real Estate	2:13
2	Buying the Asset	5:14
3	Capital Markets	7:26
4	Development and Construction	7:14
5	Equity vs. Debt — Which Side of the Equation?	4:22
6	The Real Estate Continuum	6:29
7	Entry-Level Career Guide	7:55
8	AI and Commercial Real Estate	6:08

8 lessons · 47 min — 12 TOP 30 LISTS

04 Commercial Banking, Finance & Leasing

Commercial banking, lending, equipment finance, and leasing businesses.

1	Commercial Banking, Finance & Leasing — Introduction	2:42
2	Commercial Banking	6:25
3	Treasury Services	5:14
4	Owner-Occupied Real Estate	5:28
5	Commercial Leasing	6:18
6	Entry-Level Career Guide	5:36
7	AI and Commercial Banking, Finance & Leasing	6:48

7 lessons · 39 min — 5 TOP 30 LISTS

05 Wealth Management & Private Banking

Careers helping individuals, families, and institutions manage and grow wealth.

1	Introduction to Wealth & Private Banking	2:08
2	Private Banking	5:07
3	Wealth Management	6:51
4	Entry-Level Career Guide	2:59
5	AI and Wealth Management & Private Banking	6:46

5 lessons · 24 min — 10 TOP 30 LISTS

06 Shared Services

Accounting, finance, operations, and other functions that support every financial services business.

1	Introduction to Shared Services	2:18
2	Risk & Credit Management	2:13
3	Operations	2:08
4	Marketing & Communications	2:12
5	Legal & Compliance	2:16
6	Internal Audit	2:16
7	Human Resources	2:11
8	Facilities	2:17
9	Accounting & Finance	3:40
10	Technology & IT	2:17
11	Shared Services — Entry-Level Career Guide	3:46

11 lessons · 28 min — CAREERS IN EVERY SEGMENT

STEP 2 NextStep360™ Career Assessment

20 QUESTIONS · ABOUT 4 MINUTES

Points you to the financial services segment and the entry-level roles that fit the way you work and what you want from a job. Take the test and see how your results compare to your interests.

STEP 3 Build Your Target List: 45 Top 30 Employer Lists

The companies that hire in each segment, ready to download.

Investment Banking & Private Equity 10
- Global Investment Banks
- Elite Boutique Advisory Firms
- Middle-Market Investment Banks
- Restructuring Advisory Firms
- Private Equity Firms
- Middle-Market Private Equity Firms
- Lower Middle-Market Private Equity Firms
- Sector-Specialist Private Equity Firms
- Venture Capital Firms
- Hedge Fund Firms

Consumer Finance & FinTech 8
- Consumer Finance Companies
- Mortgage Lenders
- Credit Card Issuers
- Auto Lenders
- Personal Loan Lenders
- Consumer Finance Fintechs
- MBS & ABS Investors
- MBS & ABS Rating Agencies

Commercial Real Estate & Finance 12
- CRE Investment & Holding Companies
- REITs
- Development Companies
- General Contractors & Top 15 A/E Firms
- Construction Lenders
- Stabilized Lenders
- GSEs & Agency Lenders
- CMBS Lenders
- Mezzanine Lenders
- Preferred Equity Providers
- Brokerage & Capital Markets Firms
- Property Management Companies

Commercial Banking, Finance & Leasing 5
- Commercial Banks: National & Regional
- International Banks
- Captive Finance Companies
- Independent Finance Companies
- Non-Bank Commercial Lenders & Fintechs

Wealth Management & Private Banking 10
- Wealth Management Firms
- Private Banks
- Registered Investment Advisors
- Independent Broker-Dealers
- Insurance-Affiliated Advisory Firms
- Multi-Family Offices & Trust Companies
- Asset Management Firms
- Online & Discount Brokerages
- Wealth Fintechs & Robo-Advisors
- Custodians, TAMPs & Wealth-Tech Platforms

STEP 4 Prepare to Launch Your Career

Turn industry knowledge into a plan, a network and a job-search strategy.

PUTTING IT ALL TOGETHER 8 lessons · 40 min

1	Introduction to Putting It All Together	3:49
2	Résumé Progression Throughout College	2:51
3	Working While in College — The Tension	2:31
4	Job Strategy	7:17
5	Networking on LinkedIn	6:57
6	Preparing Yourself for the Journey	5:37
7	An Alternative Path	9:15
8	Series Conclusion	1:26

WORKSHEETS & TOOLS 7 downloads

- ✓ Career Direction & Target List
- ✓ Target Company Networking Log
- ✓ Networking Preparation Checklist
- ✓ Job Search Strategy
- ✓ Interview Checklist
- ✓ Career Prep Workbook
- ✓ Year-by-Year Career Plan

MONTHLY NEWSLETTER

Financial Services Career Insider keeps you current on news affecting each financial services segment and how it relates to entry-level positions.

YOUR MEMBER PAGE

One place for every lesson, list and worksheet, with your NextStep360 result and your progress saved as you go.

MEET THE CREATORS



Chris Bezick
30+ years in financial services and 20+ years as an executive recruiter. West Point; M.B.A., Kellogg Graduate School of Management.



Mark Hiatt, PhD
30+ years in business; has taught management and leadership at the university level since 2012. West Point; M.B.A., Kellogg; Ph.D., Business Administration.

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