



DEPARTMENT OF

Economics

BE EFFICIENT

## ECON ALUMNI CAREER PROFILE: FINANCIAL ANALYST - FP&A (FINANCIAL PLANNING & ANALYSIS)



**Brian Fike '19**

*Financial Analyst FP&A*

*(Financial Planning & Analysis)*

at E\*TRADE Financial

**Majors:** Finance and Economics

### **What do you enjoy most about your current position?**

What I enjoy most is the fluidity of the day to day tasks. There are certain monthly deliverables but my job changes quite a bit with the strategic changes the company experiences. I am also a shared resource between the team that manages all the corporate costs and the team that does the aggregate rollup for all the company financials. I get to see firsthand how the company is doing on a day-to-day basis and I enjoy providing whatever insight I can into both the micro and macro view.

### **What is a typical day like in your position?**

A typical day is a normal 9 to 5 schedule, however, there aren't specific daily tasks I need to take care of. There are monthly and quarterly reporting deadlines so on a day-to-day basis it is important to make sure you are on track for these reports and communicate with business managers throughout the company to see if their forecasts for certain costs are changing. In addition, certain scenario questions often arise, like how our forecast and metrics are affected by a 25-basis point swing in interest rates. These questions are on more of an ad hoc basis based on the overall economy, but they come up often.

### **Which undergraduate experiences (i.e. internships, on-campus leadership, living learning communities, faculty member, etc.) did you find most helpful in preparing you for your current position?**

I would say the internships I had prepared me the best for work life, just from a time adjustment and scheduling perspective. There are a lot of clubs

on campus and I would recommend taking advantage of those too. For example the Smith Finance Group is a great one for anyone looking to go into the finance industry (see their [website](#) for membership requirements).

### **How has your coursework helped you in your current position (i.e. quantitative skills, research techniques, communication skills)?**

The coursework I experienced changed my whole perspective and approach on how to learn. From a quantitative perspective I recommend everyone take econometrics, which is a great steppingstone for learning the process of conducting research. Coding is also a great skill I picked up in my coursework and, although it may seem difficult, any coding skills you can bring to the table are a plus. The number one driver, however, is to maintain relationships with people. I was honestly never very good at it but even if you don't get selected for a position or opportunity, keep in touch with your contact and they will remember how dedicated you are.

### **Any job or internship advice for students seeking a position in your field?**

My advice would be to keep an open mind and don't try and find a job that's so specific that you are already closing yourself off to so many other opportunities. I would focus on figuring out what type of overarching industry you want to work in and then research from there. Also, if you want to go into Finance, or the investment management industry in particular, the CFA designation is a great certification to try and strive for. I encourage you to research and start early, you may be able to take the first exam as early as your final year of undergrad.

### **Anything else you want to share with undergraduates?**

Challenge yourself to do something every day that takes you out of your comfort zone. If you can do that, you will be less surprised by and more ready for any random tasks that come your way. Finally, don't be afraid to ask questions. Even if you don't know who to go to with a question, chances are someone around you does so just reach out for help.

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