

Special Considerations for Finance Resumes

Length

- Finance and accounting-focused resumes are 1-2 pages, depending on experience
- References may be listed on a 2nd/3rd page with your full contact info
- Consider creating a concise 1-page Career Fair/conference/networking resume

Style

- Stick to a more conservative style – consider who will be reviewing your resume
- Stand out for the content, not a unique resume format

Unique Sections

- Depending on the type of position you're applying for, you may want to highlight technical skills such as software knowledge and programming or analytical skills
- Be sure to add a section including any current licenses or certifications (i.e., Certified Financial Planner [CFP]) you may have related to your field, if applicable

Resume Basics

Your resume is not a static document. It may be used to apply for jobs/internships, scholarships, graduate/professional programs, or for networking. The key is to tailor your document to highlight your relevant qualifications for each situation. The following sample is meant to present a single, possible style. Your resume should reflect your own interpretation, style, and experience. Consider the following when creating your resume:

Organization & Layout

- Organize content according to what is required and relevant to the position or program
- Use margins (.5 to 1-inch), sections, or columns to balance and organize your content
- Balance the content of your resume using left and right justification, spacing, and tab settings to draw attention to relevant information – remember consistency is key

Fonts & Style

- Use a font that is clear and easy to read at-a-glance
- Adjust the size (10-12 pts, typically) based on the font
- Incorporate style elements like **bold**, *italics*, CAPITALIZATION, and underline to draw attention to the most important parts of your resume
- Each style element should emphasize a single type of information

Sections & Content

- Create section titles that market your experiences and align with what an employer or program is looking for
- Select what you choose to include (ex. education, certifications/licensure, experiences, knowledge, skills, community outreach, leadership, etc.) based on what is required and relevant within the job/program description
- List section information in reverse-chronological order with the most recent, relevant content first
- Format your content to make it easily accessible to the reader - it is much easier to skim bullet points for information than paragraphs
- Be concise but thorough – do not ramble or use irrelevant “filler” words

Name

Address ▪ City, State ▪ Phone ▪ Email

Education

Bachelor of Science in Finance

University of Wisconsin-Stevens Point (UWSP)

Minor: Accounting

May 2023

Stevens Point, WI

Experience

Mortgage Loan Processor

Wells Fargo

Jul. 2023 - Present

Green Bay, WI

- Provide exceptional customer service while guiding clients through their home loan applications
- Communicate effectively with customers, brokers, and settlement agents to ensure accuracy of loan file prior to submitting to underwriting for review
- Ensure all compliance and underwriting guidelines are met for each application
- Maintain complete confidentiality when working with customers' financial and personal information

Student Financial Coach

UWSP Financial Literacy Association

Jan. 2022 - May 2023

Stevens Point, WI

- Assisted students with budgeting, loan applications, financial planning, and understanding credit scores in one-on-one coaching sessions
- Maintained confidentiality when working with students' financial and personal information
- Served as a resource for students and made referrals to other campus offices as necessary

Accounting Intern

Peoples State Bank

May 2022 – Aug. 2022

Wausau, WI

- Co-prepared selected general ledger entries and reconciliations while adhering to guidelines
- Received, approved, and investigated accounts payable invoices
- Assisted in the preparation and facilitation of financial audits by thoroughly documenting audit tests and findings
- Analyzed historical client financial data and presented results to senior management

Involvement

UWSP Accounting Club

Jan. 2020 - May 2023

- **Member:** Assisted club with fundraising efforts and event planning; attended meetings and events regularly

UWSP Disc Golf Club

May 2021 - May 2023

- **Treasurer** (May 2021 - May 2023): Kept Club account current, collected dues, and processes reimbursements for events; coordinated all Club fundraising activities

Relevant Skills and Knowledge

- Microsoft Office (Excel, Word, PowerPoint)
- QuickBooks
- Corporate Risk Management
- SQL
- Applied Corporate Finance
- Money and Financial Markets
- Financial Planning
- R and RStudio