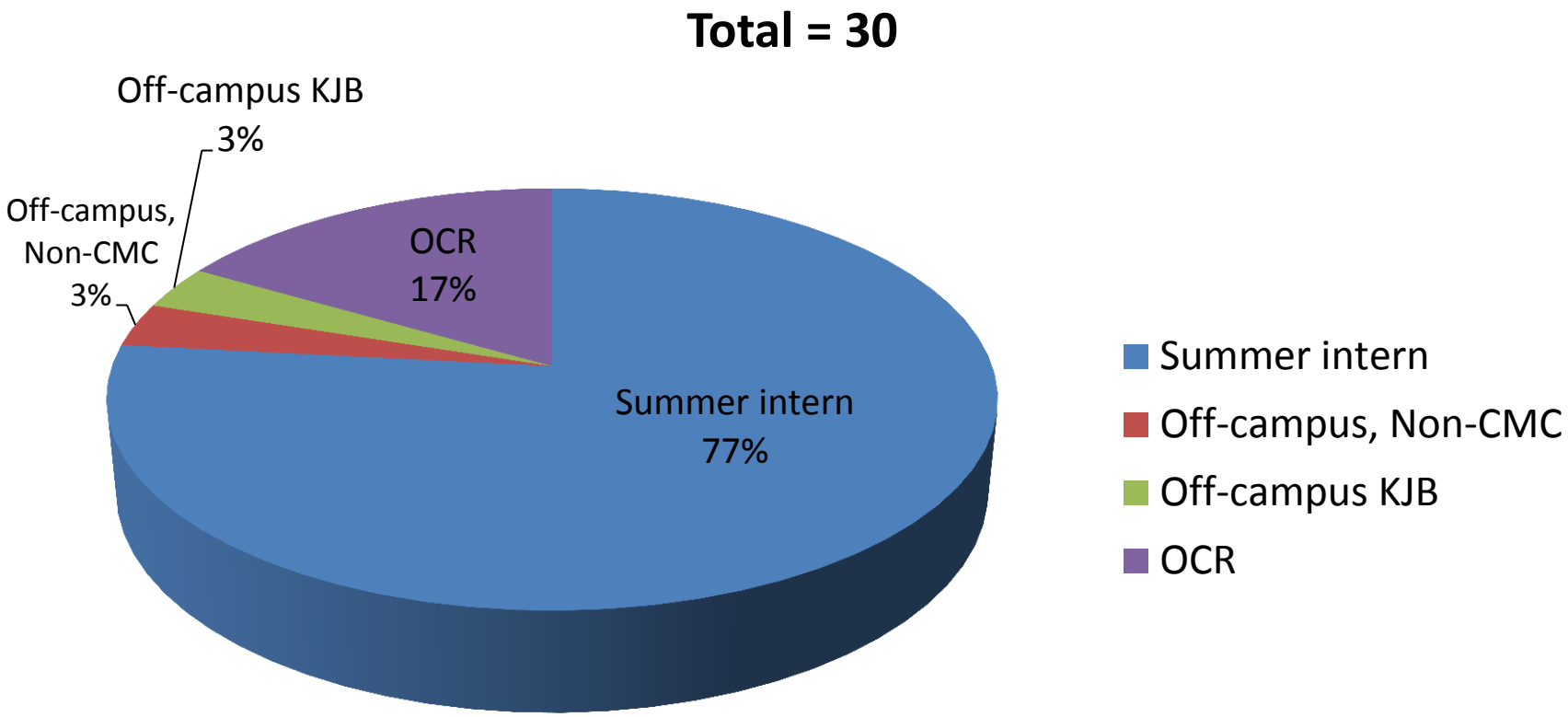
PTMBA Investment Banking and Corporate Finance Overview

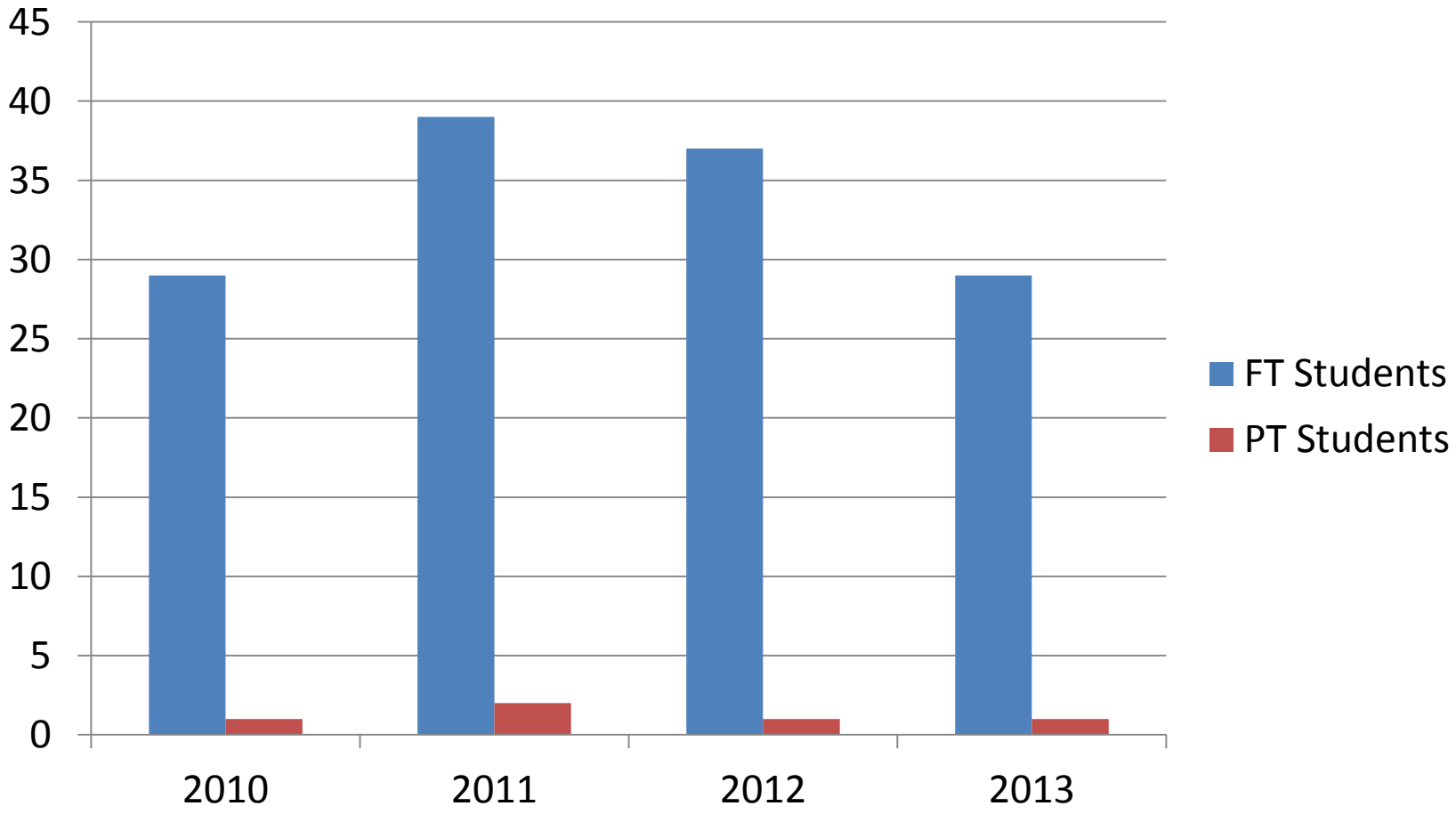
Mary Simon, Director Career Advising & Education

April 20, 2013

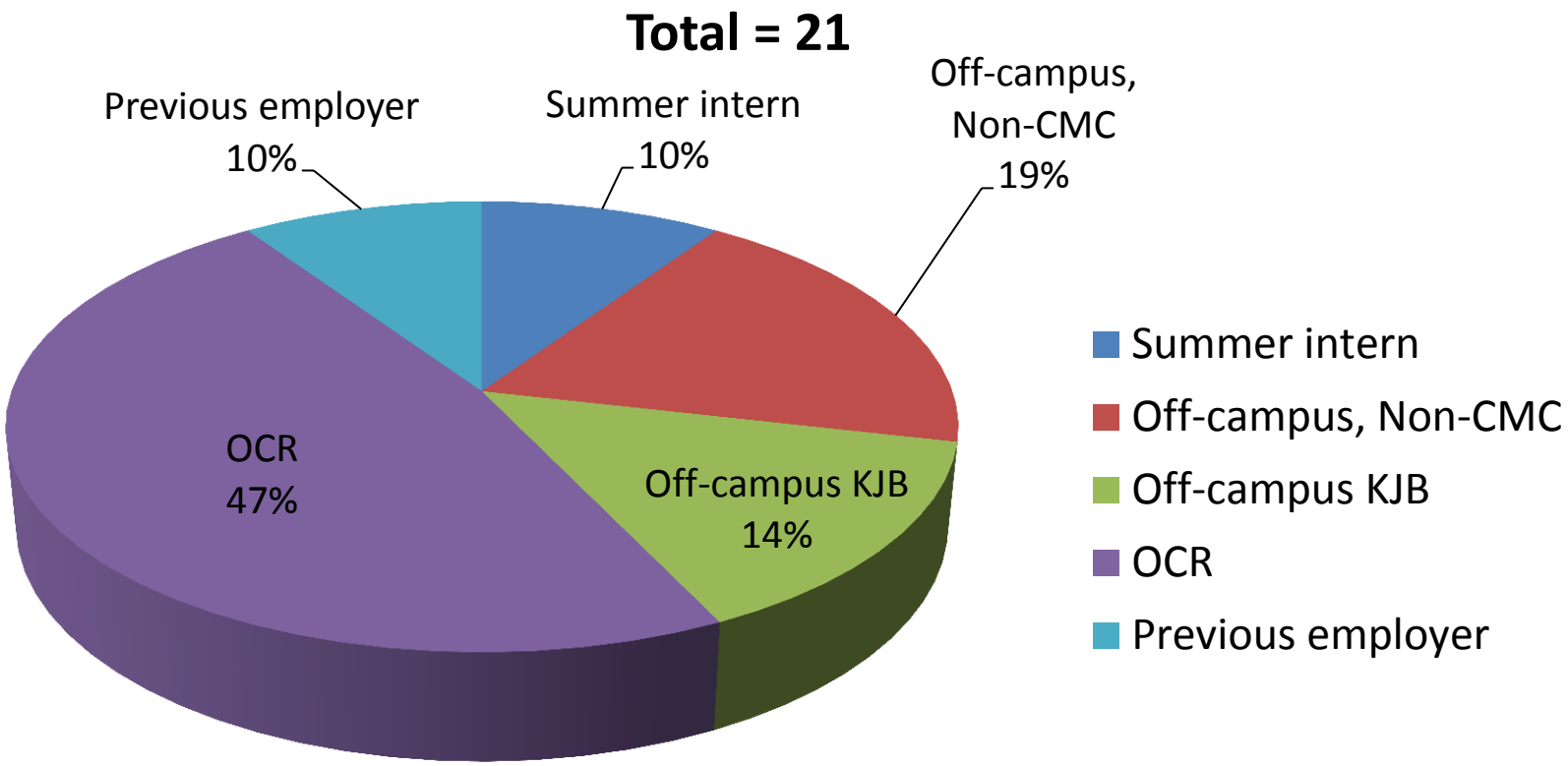
Sources of IB Offers – Class of 2013



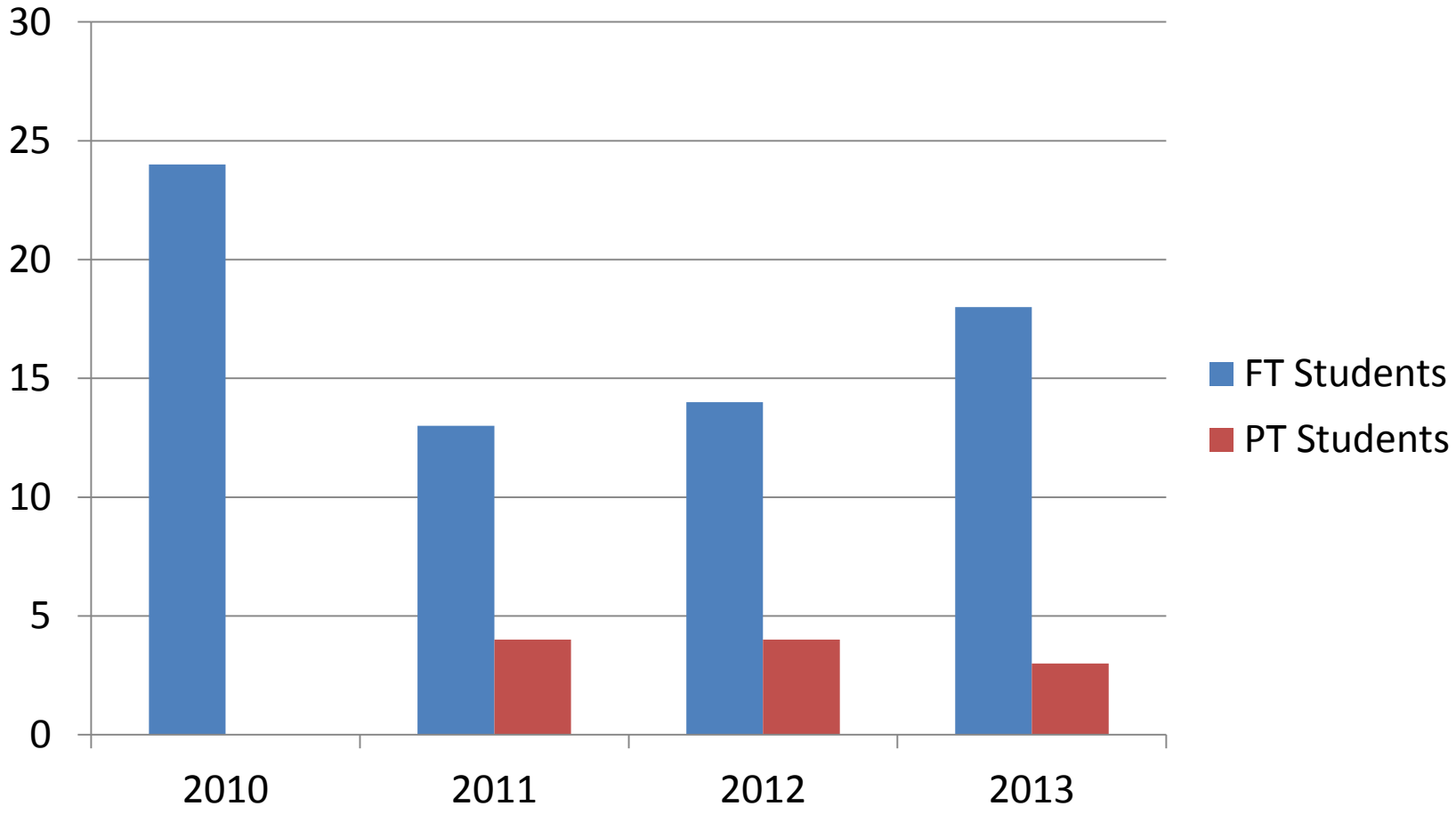
2010 - 2013 Banking Offers



Sources of Corporate Finance Offers – Class of 2013



2010 - 2013 Corporate Finance Offers



What banks recruit from Kellogg? On Campus Fall 2012

- Evercore
- Houlihan Lokey
- International Financial Corporation
- Lazard Middle Market
- Lincoln International
- MHT Partners
- Robert W. Baird
- William Blair

What banks recruit from Kellogg?
KJB Fall-Winter 2012

- Bank of America Merrill Lynch - Asia
- Barclays - Asia
- Blackstone
- BMO
- Citi
- Eastdil
- Edgeview Partners
- Greenhill
- Harris Williams
- Houlihan Lokey
- Lazard Freres
- Morgan Stanley
- Royal Bank of Canada
- Simmons & Co

What companies recruit from Kellogg for Corporate Finance positions?

On Campus

- Amazon
- American Airlines
- Chevron
- Chrysler
- Discover
- DISH Network
- E & J Gallo
- ExxonMobile
- General Motors
- Target
- United Airlines

Post on KJB

- 7-Eleven
- Anheuser-Busch
- Burger King
- Caesars Entertainment
- Delta Airlines
- Discover Financial
- DTE Energy
- GE Capital
- Google
- Oracle
- PepsiCo
- Sears Holdings
- Sprint Nextel
- Symantec
- Toys R Us

Salaries and Job Titles

Investment Banking

Salary:	100K
Sign On Bonus:	40K
Titles:	Associate

Corporate Finance

Salary:	110K average
Sign On Bonus:	21K average

Titles:

- Associate Finance Manager
- Finance Manager/Associate
- Treasury Specialist
- Finance LD Program Associate
- Financial Analyst
- Senior Financial Analyst

Typical Profile - Investment Bankers

- Investment bankers typically have the following skills:
  - Quantitative Analysis
  - Strong Client Service Abilities (C-level)
  - Teamwork
  - Attention to Detail
  - Results Driven
  - Ability to manage up, down and across
- Bankers are typically:
  - Driven
  - Competitive
  - Able to work long hours and under pressure
  - Strong Presence
- Typical motivators for bankers
  - Passion for the markets
  - Deal flow and intensity
- Bankers are NOT
  - Autonomous
  - (generally) Altruistic
  - Concerned with work-life balance

Typical Profile - Corporate Finance

- Corporate finance professionals typically have the following skills:
  - Quantitative Analysis
  - Problem solving and critical thinking
  - Strong Communication Abilities
  - Attention to Detail
  - Teamwork
  - Ability to manage up, down and across

- Finance professionals are typically:
  - High Energy
  - Analytical
  - Strategic partner to business leaders
  - CFO Track

- Typical motivators for finance professionals
  - Passion for industry and operations
  - Work-life balance

Banking Recruiting Timeline

June

- Resume
- Pitch
- Network
- Attend FT CMC workshop

July

- Network
- Firm Research
- Kellogg Resume Review
- Meet with FT CMC coach
- Refine pitch
- Technical Preparation

August

- Meet with FT CMC coach
- Upload resume into Resume Database
- Attend FT CMC workshop
- Technical Preparation
- Firm Research
- Network in New York
- Mock Interview
- Interview Stream on-line interview program
- Review past bid history, develop own strategy

Banking Recruiting Timeline

September

- Cover Letters for closed interviews
- Bidding for open interviews
- 2nd Mock Interview
- Network
- Research
- Attend Kellogg Networking Nights in Evanston

October

- Cover Letters for closed interviews
- Bidding for Open Interviews
- Research companies
- Attend pre-recruiting events in Evanston
- Attend Kellogg Networking Night
- OCR begins Oct. 15
- Thank you emails

November

- OCR continues through week of Nov. 15
- Thank you emails
- Report offers/acceptance to CMS
- Remove self from interviewing after acceptance of offer

Corporate Finance Recruiting Timeline

June

- Resume
- Pitch
- Network
- Attend FT CMC workshop

July

- Network
- Research
- Kellogg Resume Review
- Meet with FT CMC coach
- Refine pitch
- Attend potential company presentations

August

- Meet with FT CMC coach
- Upload resume into Resume Database
- Attend FT CMC workshop
- Identify job descriptions of OCR firms
- Research firms
- Network
- Mock Interview
- Interview Stream on-line interview program
- Review past bid history, develop own strategy

Corporate Finance Recruiting Timeline

September

- Cover Letters for closed interviews
- Bidding for open interviews
- 2nd Mock Interview
- Network
- Research
- Attend pre-recruiting events in Evanston
- Attend Kellogg Networking Nights in Evanston

October

- Cover Letters for closed interviews
- Bidding for Open Interviews
- Research companies
- Attend pre-recruiting events in Evanston
- Attend Kellogg Networking Night
- OCR begins Oct. 21
- Thank you emails

November

- OCR continues through week of Nov. 15
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Questions?