



Early Start to the Finance Option

February 27, 2025

Land acknowledgement

UBC Vancouver (Point Grey) is located on the traditional, ancestral, and unceded territory of the x^wməθk^wəy'əm (Musqueam) people.

To learn about the lands that you occupy, visit www.native-land.ca



Session outline

- Introductions
- Why finance and what makes careers in finance special
- Why Early Start to the Finance Option (ESTF)
- Eligibility and admissions
- Registration in required Finance courses in Year 2
- Finance Option requirements
- Popular career paths in finance
- Key skills and attributes
- Understanding roles and recruiting prep
- Is this option pathway the right fit for me?
- Opportunities for involvement and experience
- Q & A



Introductions

UBC Sauder Finance Division

- **Jan Bena**, Associate Professor & Finance Division Chair
Bank of Montreal Chair in International Finance
- **Jose Pizarro**, Lecturer, Finance Division
- **James Shou**, Adjunct Professor, Finance Division

Hari B. Varshney Business Career Centre (BCC)

- **Iane Aguiar**, Manager, Business Development
- **Misa Zhang**, Career Strategist

Undergraduate Office (UGO)

- **Abril Castillo**, Academic Advisor
- **Katelyn Huang**, Academic Advisor



Why Consider a Career in Finance

- The role of capital markets and finance in society continues to grow in importance.
- Finance professionals and institutions are assuming broader responsibilities.
- Pursuing a finance career requires **strong academic** foundations, complemented by **experiential learning** opportunities.
- **UBC Sauder is a leader in both** academics and practical experience.
- This event showcases the **Early Start to the Finance Option (ESTF)** as a pathway to diverse career opportunities in the finance industry.
- The finance industry offers a wealth of opportunities—make informed decisions about your career path!

Why Consider a Career in Finance

- A **dynamic and innovative industry** with consistently high demand for graduates.
- Provides stimulating and exciting job **opportunities in many different areas**.
- Offers **rapid career progression** compared to many other industries.
- **Clear pathways for advancement** with ample opportunities for growth and excellence.
- Diverse career options available, tailored to **different skills and preferences**.
- Opportunities for **global work**, offering a broad international scope.
- **Abundant exit opportunities** for those looking to transition into other industries.

Finance Careers

Traditional

- Money Management
- Investment Banking
- Commercial Banking
- Corporate Finance
- Central Banking
- Venture Capital
- Private Equity
- Private Debt

Advancing

- FinTech
- Big Data / Asset Digitalization / AI Integration
- Climate Finance / Impact Investing / Sustainable Finance
- Research and Regulation
- Financial Forensics and Compliance

Why we offer an Early Start to the Finance Option (ESTF)

- **Response to job market** – internships in capital markets are being offered earlier with interviews during fall of Year 2 and 3.
- Students take **COMM 298 in Summer Term 1 or Winter Term 1 of Year 2** and take the core required Finance Option courses **COMM 370 and 371 in Winter Term 2 of Year 2**.
- Aimed at students that – before the beginning of their Year 2 – have a **strong interest in finance and desire to explore careers in capital markets**.
- **ESTF changes the timing of the curriculum**.
- The world of finance is evolving rapidly and is offering many (novel) opportunities beyond capital markets careers. **It is totally fine to take time, explore more, and enter the Finance Option starting Year 3.**

What is required to be eligible for ESTF?

Students are required to:

1. Be starting Year 2 for the first time in 2025W. Students who had a Year 2 eligibility in a previous winter session are not eligible.
2. Have the following courses completed before the end of **Winter Term 1** of 2025W:
 - **COMM 190 – Introduction to Quantitative Decision Making**
 - **COMM 293 – Financial Accounting**
 - **COMM 295 – Managerial Economics**
 - **COMM 298 – Introduction to Finance**
3. Have the following courses completed by the end of **Winter Term 2** of 2025W:
 - **COMM 191 – Application of Statistics in Business**
 - **COMM 294 – Managerial Accounting**
4. Be eligible for promotion to Year 3 after 2025W. See this [link](#).
5. Submit a two-part application for admission to the Early Start to the Finance option.
 - i. Part One of the application must be submitted after successful registration in COMM 298 (date to be determined).
 - ii. Part Two of the application must be submitted by the end of Winter Term 1 (date to be determined).

ESTF admissions criteria

Space in ESTF is limited and admission is competitive. All courses requiring a minimum GPA must be completed by the end of Term 1 of 2025W.

The admissions criteria include:

- A minimum grade of 65% in each of the following UBC courses: COMM 190, COMM 293, COMM 295
- A minimum grade of 75% in COMM 298 – Introduction to Finance
- A minimum average of 76% calculated on all of COMM 190, COMM 293, COMM 295, COMM 298
- Qualitative evaluation in COMM 298 and other relevant courses
- Completing both parts of the ESTF application



Registration in required Finance courses in Year 2

2025 ST1 WT1 Required Course

COMM 298 – Introduction to Finance

There will be limited space in COMM 298. Registration will be on a first-come, first-served basis depending on your registration date and time. If you are not able to register in any of the ST1 or WT1 sections, register for a WT2 section. If any seats become available in a WT1 section before the September add/drop deadline, you can switch yourself.

2025W WT2 Required Courses

COMM 370 – Corporate Finance

COMM 371 – Investment Theory

The UGO will register you in these courses at the start of Term 2 once you are accepted into the ESTF.



Finance Option (Year 3 start)

Year 2	
COMM 298	Introduction to Finance (WT2)
Year 3	
COMM 370	Corporate Finance (WT1)
COMM 371	Investment Theory (WT1)
COMM 374	Applied Financial Markets (WT2)
Year 4	

Six credits from the following courses:

COMM 376	Financial Institutions
COMM 377	International Financial Markets and Institutions
COMM 470	Venture Capital
COMM 471	Mergers and Acquisitions
COMM 474	Fixed Income Markets & Management
COMM 475	Investment Policy
COMM 477	Risk Management & Financial Engineering
COMM 479	Advanced Topics in Corporate Finance
COMM 476	Advanced Topics in Investment Management
COMM 486T	FinTech

ESTF (Year 2 start)

Year 2	
COMM 298	Introduction to Finance (ST1 or WT1)
COMM 370	Corporate Finance (WT2)
COMM 371	Investment Theory (WT2)
Year 3	
COMM 374	Applied Financial Markets (WT2)
Year 3 or 4	

Six credits from the following courses:

COMM 376	Financial Institutions
COMM 377 ¹	International Financial Markets and Institutions
COMM 470	Venture Capital
COMM 471	Mergers and Acquisitions
COMM 474 ¹	Fixed Income Markets & Management
COMM 475 ¹	Investment Policy
COMM 477 ²	Risk Management & Financial Engineering
COMM 479	Advanced Topics in Corporate Finance
COMM 476 ¹	Advanced Topics in Investment Management
COMM 486T	FinTech

¹ COMM 371 is a prerequisite for the course.

² COMM 374 is the prerequisite for the course.

Elective Courses offered by UBC Sauder Finance Division

- Financial Institutions
- M&A
- Venture Capital
- Entrepreneurial Finance and Private Equity
- FinTech
- Behavioral Finance
- Project Finance*
- Personal Finance*
- Introduction to Capital Markets*
- Applications of AI in Finance*
- Climate Finance*
- International Finance
- Investment Policy*
- Advanced Topics in Investment Management
- Fixed Income Markets and Management*
- Advanced Topics in Corporate Finance
- Risk Management and Financial Engineering

* Indicates new or recently renewed courses. Finance Option requires at least 6 credits.

COMM 271 – Introduction to Capital Markets

- Industry-integrated experiential learning
 - **Guest speakers from leading firms** on the buy side as well as the sell side.
 - **Student-led case discussions** on cutting-edge financial problems.
- Professional development focus
 - Builds **networking opportunities** with capital markets professionals.
 - Enhances public speaking & **presentation skills**.
- Offered in WT1 of Year 2 to **complement COMM 298**
 - **Market Structure & Trading**: Exchanges, hedge funds, traders, and market makers.
 - **Financial Instruments**: Stocks, bonds, ETFs, derivatives, and alternative assets.
 - **Execution & Liquidity**: Order types, arbitrage strategies, and high-frequency trading.
 - **Investment Banking & Capital Markets**: Investment banks: IPOs, M&A, and structured finance.
 - **Hedge Funds & Asset Management**: Investment strategies, risk premia, and smart money moves.

As a career strategist, I often hear students asking...

Other students around me are choosing finance and they seem to be determined. Why am I left behind?

My parents told me I should study finance, but am I a good fit for finance career?

How can I know if I am interested in finance or not?

How is it possible to figure out the career path for the rest of my life when I am only 20?

What if I only know what I dislike but not what I like?



It only means you need to explore your career path. And, there are opportunities for you to explore.

Hear it from industry professionals:

Why did I choose to pursue a career in finance?

- Enjoyed finance courses at school
- Enjoyed reading finance-related news and articles
- Gained valuable insights from finance professors, alumni, upper-year students and friends in the industry and learned more about the different areas of finance
- Discovered passion for finance from case competitions and finance student clubs
- Found interest in subjects that require analytical skills and logical thinking as well as their application to real-world
- Developed strong quantitative skills
- Enjoyed working with and interpreting numbers



Explore your career path

Read

Online Research

Different areas of finance, career paths, potential job responsibilities and required skills

Talk

Networking

Company recruitment sessions, finance networking events, coffee chat with people in finance

Try

Extracurricular Activities

Finance student clubs, case competitions, conferences, school programs



Popular career paths in Finance



**Banking,
Sales and Trade**



**Equity and Debt
Capital Markets**



**Impact & Socially
Responsible Investing,
Compliance and Risk**



**Asset & Investment
Management**



**Corporate Finance,
ESG**



**Private Equity,
Venture Capital**



**FinTech,
Crypto & DeFi**



**Trading,
Exchanges, Brokers**

And many more!!

Finance Internship Recruitment Cycles

Taking 2026 summer internship in different areas as an example:

January – March, 2025

Mainly investment banking summer analyst positions

April – September, 2025

Sales and Trading, Equity Research, Private Equity, Pension Funds, Wealth Management, Corporate Banking, Commercial Banking positions

September – December, 2025

Different roles in finance keep coming up. From mid September to late October, a lot of companies will host company recruitment sessions on campus/online to recruit Sauder students.

January, 2026

January is the time when we see most finance summer internship openings. You'll also see new postings for 2027 IB summer internship.

February - April, 2026

Very a few postings from big firms. Some postings from small-mid size firms.

May, 2026

2026 summer internship starts!

Mentorship & Specialty Programs

Finance Mentorship Program

Explore career opportunities in the finance sector and prepare for summer recruitment, paired with an industry professional.

Portfolio Management Foundation

The UBC Portfolio Management Foundation (PMF) provides a small group of select BCom students with an experience that will provide world-class training in the global capital markets.

Financial Modelling & Interview Prep Program

A self-paced online training program designed to equip BCom students with comprehensive skills in financial modelling and interview preparation

UBC SWIFT: UBC Sauder Women in Finance Training

An extra-curricular program for BCom students. Through connections between academics and practitioners in finance, students reconcile practical portfolio management with rigorous academic theory.

<https://mybcom.sauder.ubc.ca/career-experience/mentorship-specialty-programs>

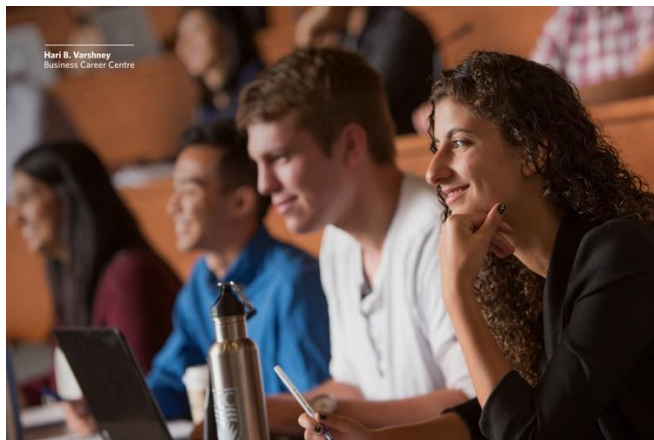
Early Start to Finance Option

Have a focus in finance earlier than taking traditional finance option. Get early exposure to finance recruitment and extracurricular activities.

Be better placed to apply for summer internships in the capital markets space based on having more 'technical' knowledge through the finance courses offered.



Exclusive Opportunities for ESTF Students!



Investment Banking Access Pathway (IB-AP) Resume Book

Bridging UBC Sauder's Finance Talent
to Investment Banking Opportunities

UBC SAUDER
SCHOOL OF BUSINESS

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Investment Banking Access Pathway (IB-AP)

The Investment Banking Access Pathway (IB-AP) is a program designed to help 2nd-year students to land summer internship in investment banking.

Participants will submit evidence to demonstrate their potential across nine criteria vetted by employers. Students who meet the GPA requirement and also at least seven of the nine criteria will be included in a Sauder BCom resume book.

The resume book will be distributed to top financial employers like CIBC, RBC, TD, BMO, Scotiabank, and others across North America in January 2026.

Investment Banking Access Pathway (IB-AP)

Selection Criteria

- 1) Finance-learning Initiative: Finance prep courses or self-study activities.
- 2) Strong GPA in Relevant Courses: A minimum GPA of 78% in COMM 190 Introduction to Finance, COMM 293 Introduction to Quantitative Decision, COMM 295 Financial Accounting, and COMM 298 Managerial Economics.
- 3) Relevant Work Experience
- 4) Professionalism, Communication, and Work Ethic
- 5) Finance Competitions
- 6) Involvement with Finance Clubs
- 7) Networking Skills
- 8) Non-Finance Extracurricular Activities
- 9) Bonus Technical Mock Interview: Students who meet 6 out of the 8 key criteria above by Nov 2nd, 2025 will be eligible to attend a technical mock interview that will count as the 9th criteria.

Students who met at least seven criteria and with a minimum cumulative GPA of 80% are included in this Resume Book.



**We just had a successful pilot
year for IB-AP. Curious about
the feedback?**


How to participate?



Register in the Early Start to the Finance (ESTF) Option

Enroll to IB-AP canvas course, detailed instruction on program application is provided on the canvas page.

(Canvas page enrollment open: September 2nd, 2025)



Review selection criteria and evidence requirement on the canvas page.
Submit evidence as instructed.

(Last day of evidence submission: November 2nd, 2025)

If you want to learn more about IB-AP, please scan on the QR code.



Is this option pathway the right fit for me?

Questions to ask yourself:

- With a such a condensed timeframe, am I ready to commit myself to the additional time needed outside of classes for coffee chats, attending CISs, joining finance-related clubs, taking part in learning / using online resources?
- Am I committed to maintaining my grades throughout my second and third years?
- Do I possibly need more time (a longer runway) for me to explore the multitude of finance careers?



We are here to help!



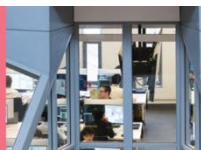
- Check *Working in Finance* document on COOL
- Drop-in/Book appointment with Career Peer Advisor (Before April 4th)
- Book appointment with BCom Career Strategists (After April 4th)

Get Involved and Gain Experience

Student-Led Clubs, Funds, and Communities



Competitions & Conferences



Questions?



An aerial photograph of the University of British Columbia campus. A wide, green lawn runs down the center, flanked by rows of trees. To the left is a long, modern building with a glass facade. To the right are older, multi-story buildings. In the background, a body of water and distant mountains are visible under a blue sky with light clouds.

Thank you
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