

A Day in the Life of a Finance Analyst

Here's what you can expect in our full-time Rotational Associate Program.

We asked Analysts who've been through this career-path program to answer the most frequently asked questions about this position. Allison, in Cleveland, Ohio, shared some experiences as a Finance Analyst.

Q. What is your typical day like in this Program?

It really depends on the group in Finance through which you are rotating. A general rule is that there will be many meetings and report updating (mostly through Excel) after the last day of the quarter. Many groups have responsibilities (usually updating an Excel file) that Rotational Analysts can pick up; sometimes, however, you will be asked to create something new for the team to provide greater insight into an issue—this is where they are looking for you to show off your Excel skills, creativity, and project process.

Q. What areas can Analysts rotate through in this program? And, how many rotations do you go through?

Analysts can expect four rotations, each one quarter long, in Corporate Treasury, Corporate Tax, Accounting, Financial Risk Governance, Financial Planning & Analysis, Regulatory Reporting, Key Technology Operations Finance, Community Bank Finance, Corporate Bank Finance, Investor Relations or Corporate Strategy.

Q. What is the typical career path for someone who starts as an Analyst in this program?

It all depends on what risks you take and how you move in your career (laterally, vertical, realignment, relocation, enrichment, etc.). No one follows the same career path; it's all about what you do with your career.

That being said, the Finance Leadership Team has reiterated their desire to develop internal talent. The hierarchy of positions in Finance is Analyst, Lead Analyst (2-5 years' experience), Senior Analyst (5+ years' experience), Finance Manager, and Finance Director.

Q. What would you say are the most important traits an Analyst needs to be most successful in this program?

There are a number of traits that are a definite advantage for an Analyst to have:

- **Be Flexible** – There are some rotations where you will have certain tasks to do that you will know exactly what needs to be done and what the finished product is going to be. There are other rotations where you will be working on something, and before you complete it, there will be one or multiple changes you have to make as a result of new information. Be ready for change, and you will be much better off.
- **Don't be afraid to ask questions** – One of the objectives of the rotational program is to allow you to learn. All of the managers I have had in my three rotations have welcomed any questions and were always happy to sit down and go over topics that I was unsure of or just wanted to know more about.

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- **Technical** – Excel, Googling, ability to grasp new programs quickly. We're supposed to be the "tech savvy" generation, so be ready to show that off.
- **Communication** – Always communicate with your manager what you want to get out the rotation, what additional responsibilities you want, and what your goals are. Also, be comfortable reaching out to people in other areas and coordinating with them to fulfill responsibilities/information requests. The managers care about the rotational program and want the analysts to succeed.

You should also have a good attitude toward your job.

Q. What is your favorite part of being an Analyst in this program?

The amount of experience and knowledge you gain through this program is irreplaceable. In my short time here, I've done everything from prep for the quarterly earnings call to investors to trading Fed Funds and working with brokers on the daily to reviewing Regulatory schedules to be submitted to the Fed. Everyone wants you to get as much experience as possible, which gives you a better idea of how each area within Finance functions as well as how they work together with other groups in the bank.

Another great part of the analyst program is the exposure it provides. Whether it's sitting in on meetings with executives, presenting to the entire department, or having a boss say you're ready for the next big project, I can't say I would have been able to experience these opportunities within a year of graduating anywhere else.

Q: What do I need to know before applying for the program?

Preferred Majors: Business Majors (Finance, Accounting, Economics), but they really are looking for a critical thinker and self-motivated person.

Minimum GPA: Minimum cumulative 3.3 GPA required, 3.5 GPA preferred.

Certifications: All are optional: Chartered Financial Analyst® (CFA), Certified Public Accountant® (CPA), or MBA.

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