

Kyle's Ultimate Career Execution Plan

Open full Weekly Calendar →

<div>Location</div> <div>Bay Area</div>	<div>Timeline</div> <div>Sept 2025–2028</div>	<div>North Star</div> <div>\$120K–200K+ by 2028</div>	<div>Runway</div> <div>6–8 months</div>
<div>Target Start</div> <div>Feb 2026</div>		<div>Schedule</div> <div>Sleep: 10PM–6AM Market: 6:30AM–1PM PT</div>	

Execution Phases

Phase 1: Foundation & Market Entry

Sep–Dec 2025

Goals:

SIE passed

CMT Level I (Dec exam)

50+ applications

15+ interviews

60+ posts, 4+ articles

75+ connections, 15+ coffee chats

Legend Room portfolio ready

Phase 2: Interview Intensification & Job Closing

Jan–Mar 2026

Goals:

3–4 offers by mid-Feb

\$80K+ starting position

CMT Level II registered

70%+ pipeline conversion

Phase 3: Performance & Rapid Advancement

Mar 2026–Dec 2027

Goals:

Top 20% performer

CMT II complete

\$95K+ by Mar 2027, \$120K+ by Dec 2027

Speaking + published research

Phase 4: Mastery & Wealth Building

2028+

Goals:

CMT Charter complete

\$150K–300K+ total comp

Industry authority

Wealth building on track

Phase 1: Foundation & Market Entry — Target Companies

Tier 1A	Tier 1B	Tier 2	Tier 3
Charles Schwab (SF HQ) <hr/> Interactive Brokers <hr/> Robinhood (Menlo Park) <hr/> Franklin Templeton (SF) <hr/> TradeStation	Coinbase (SF) <hr/> Plaid (SF) <hr/> Tastytrade <hr/> Kraken (SF) <hr/> eToro	Wells Fargo (SF) <hr/> Stripe (SF) <hr/> Square/Block (SF) <hr/> Dodge & Cox (SF) <hr/> Advent/SS&C	Add targets in plan.json

Phase 2: Interview Intensification & Job Closing — Target Companies

Tier 1A	Tier 1B	Tier 2	Tier 3
Add targets in plan.json	Add targets in plan.json	Add targets in plan.json	Add targets in plan.json

Phase 3: Performance & Rapid Advancement — Target Companies

Tier 1A

Add targets in
plan.json

Tier 1B

Add targets in
plan.json

Tier 2

Add targets in
plan.json

Tier 3

Add targets in
plan.json

Phase 4: Mastery & Wealth Building — Target Companies

Tier 1A

Add targets in
plan.json

Tier 1B

Add targets in
plan.json

Tier 2

Add targets in
plan.json

Tier 3

Add targets in
plan.json

Daily Routine

Morning (30 min)

Market analysis + trade journal (25min)

CMT study or skill dev (25min)

LinkedIn engage + plan (10min)

Evening (60 min)

Market close review + setups (20min)

Networking or content (25min)

Goals review + plan (15min)

Weekly Schedule

Mon	Tue	Wed	Thu	Fri	Sat	Sun
Week planning	Deep CMT (3h+)	Networking focus	Content creation	Week review	Major study	Strategic planning
Target company research	Applications	Coffee chats	Skill development	Metrics tracking	Legend Room dev	Market analysis
Content calendar	Back + Biceps (6AM)	LinkedIn outreach	Interview prep	Follow-ups	Long-form content	CMT review
Chest + Triceps (6AM)	Market 6:30–1PM	Core + Cardio (6AM)	Shoulders + Arms (6AM)	Legs + Glutes (6AM)	Date night	Family time
Market 6:30–1PM	Content creation	Market 6:30–1PM	Market 6:30–1PM	Market 6:30–1PM	Recharge	Rest & reset
CMT 2PM		CMT 2PM	CMT 2PM	CMT 2PM		

Budget Allocation

Living Expenses	Professional Development
\$20,000	
	Cfa Cmt\$550
	Events\$1,000
	Branding\$400
	Coaching\$600
	Wardrobe\$450
	Total Professional\$3,000

Key Milestones

Level 1

- SIE + CMT I passed
- Brand established
- Network activated
- Job search launched

Jan 2026

Level 2

- Finance role secured
- \$80K+ salary
- CMT II registered
- Credibility built

Mar 2026

Level 3

- \$120K+ comp
- CMT II complete
- Recognition
- Senior role

Dec 2027

Level 4

- CMT Charter
- \$150K+ comp
- Authority
- Wealth on track

2028+