# **Pave Your Pathway: Financial Technology Checklist**

**Make a copy FIRST for yourself to then edit and utilize this document as a resource.**

*Employer-Competitive* candidates are clear on their career desires and their job requirements. This clarity of thought comes through in interviews when *Employer-Competitive*candidates clearly articulate why they believe a job is a perfect fit for them. We start by asking you to describe the job you are looking for. Then, self-assess your personalized soft and hard skill proficiencies. From there, you can communicate your passions and interests as they relate to your pathway.

Use this guide to help you think about what you want so that you are easily able to narrow your job search as needed. **Go to File>Make a Copy to utilize.** This should be a living document -- as you progress throughout the boot camp, your interests may change, so make changes here accordingly. Feel free to create additional rows and indicate your preferences in the guide below.

In the Skills Assessment section, differentiate your skills needed vs. mastered for desired role/s.

*(Check the boxes below for PC users by**right clicking the box> choosing the check mark symbol* ***/*** *Highlight or mark appropriately for MAC users.)*

**WHY FINTECH?**

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| **Reasons** | **Interests/Drives/Motivation** |
| ***It can be used in many different areas*** | ***Ex) Quality of work recognized / recognition of impact*** |
| ***The pay is good*** | ***Ex) Opportunity within the role and company to grow/professional development*** |
| ***The quality of life for people in this line of work looks mostly positive*** | ***Want to be apart of creating a system that benefits a lot of people*** |
| ***You can grow and move up if you display skill*** |  |
| ***This line of work will be used for a long time*** |  |
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**OVERVIEW OF INTERESTS**

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| **Questions to Consider:** | **Preferences:** |
| [**Data Entry Level**](http://bit.ly/FinTechPathway)**-** Which interests you the most? *Remember to be mindful of certification and skill requirements.* | * **Business Intelligence Analyst** * **Data Analyst** * **Financial Analyst** * **Junior Quantitative Developer** * **Financial Applications Specialist** * **Risk Analyst** * **Other** |
| [**Data Mid-Level**](http://bit.ly/FinTechPathway)**-** Which interests you the most? *Remember to be mindful of certification and skill requirements.* | * **Blockchain/Crypto Developer** * **Risk and Control Manager** * **Solutions Analyst** * **Operations Manager** * **Other** |
| [**Data Senior Level-**](http://bit.ly/FinTechPathway)Which interests you the most? *Remember to be mindful of certification and skill requirements.* | * **Financial Engineer** * **Quantitative (Research) Analyst** * **Quantitative Trader** * **Other** |
| **Location—** How far away from your current home are you willing to commute? Which cities are your preferences? | * **Location of Office** * **Option of Remote Work** * **Relocation Package** * **Reimbursement**   + **Train/bus/transit/parking** |
| **Travel—** Do you have travel restrictions? | * **Reimbursement**   + **Airfare/Luggage**   + **Hotel**   + **Food**   + **Transportation** |
| **Hours—** Do you need flexible hours or prefer set hours? Required meeting days/times? | * **Set Hours** * **Flexible Hours** |
| [**Compensation**](https://www.indeed.com/salaries) **& Benefits—** What are your requirements? What kinds of benefits do you need to have? What would be nice to have? | * **Full-Time** * **Part-Time** * **Insurance**   + **Health/Dental/Vision**   + **Disability**   + **Life** * **Retirement Plan** * **Stock Options** * **Financial Assistance** * **Annual Review**   + **Bonus** * **Time Off:**   + **Paid Time Off / Vacation**   + **Sick**   + **Family Leave** * **Onsite Childcare** * **Tuition Reimbursement** * **Other Benefits/Discounts**   + **Health Club**   + **Mobile Discount** |
| **Industries—** What industries are you interested in working with? (e.g. healthcare, retail, any industry) | * **Banking/Real Estate** * **Consulting/Business/Professional Services** * **Education** * **Entertainment/Recreation** * **Healthcare** * **Information Systems** * **Federal/Government** * **Oil/Gas** * **Retail** * **Other** |
| **Work Environment—** Small and entrepreneurial? Large corporation with established procedures? Growth company with a fast-paced environment? | * **Start-Up** * **Small Company** * **Large Corporation** * **Responsible for Direct Report/s** * **Other** |
| **Future Goals-** Where do you see yourself in 3 years, 5 years, 10 years, etc.? What role do you want to end your career in? What roles/ experience will help you get there? | * **1 year: getting the hang of the job and how all the parts work** * **3 years: being fluent in my work and and asset to the team** * **5 years: Being a leader within the company workforce** * **10 years: Manager or some type of lead within the company** |

**SKILLS ASSESSMENT**

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| **Field-Specific FinTech Skills** | **Transferable Skills** |
| * Amazon Web Services (AWS) * Algorithms, Statistics & Modeling * Blockchain * Financial Fundamentals * Financial Libraries & Tools * Financial Programming * Machine Learning Applications in Finance * Project Management * Python/SQL | * Adaptable * Analytical * Business Intelligence * Collaborative * Data-Driven * Desire To Learn * Empathy * Intellectually Curious * Passion * Problem-Solver * Research-Driven * Strategic Thinker * Strong Communicator |

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| **Additional Skills or Requirements to consider?** |
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**JOB SEARCH NOTES**

* Do you want to continue using your previous skills/knowledge, degree, or experience in your new role?
* Do you want to manage other people?
* What do you want your day-to-day work to look like?
* For a specific job, do you need to get a certification, build new projects, strengthen your skills, talk to someone in the role/s to get a better idea of what the work/qualifications look like?

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| **Job Title** | **Research Notes** | **Resources/Links** |
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