



**BELK COLLEGE
OF BUSINESS**
NIBLOCK STUDENT CENTER

QUEEN CITY CAREER GUIDE

FINANCE

WHAT IS FINANCE?

FINANCE IS THE STUDY OF HOW INDIVIDUALS, BUSINESSES, AND ORGANIZATIONS ACQUIRE, MANAGE, INVEST, AND ALLOCATE FINANCIAL RESOURCES. Finance focuses on evaluating opportunities, managing risk, and making decisions that create value over time. In organizations, finance professionals analyze financial information to support investment decisions, allocate capital, manage risk, and improve performance. Individuals also rely on financial expertise to achieve personal financial goals and make informed investment decisions. Many senior business leaders possess backgrounds in finance due to its central role in organizational decision-making.

FINANCE INDUSTRIES

COMMERCIAL BANKING. Provide financial services to businesses, nonprofits, and individuals, including lending, deposits, treasury management, and financial advisory services. Commercial banks play a critical role in supporting economic growth and business operations.

INVESTMENTS & FINANCIAL PLANNING. Help individuals and organizations achieve financial goals through investment management, financial planning, retirement planning, and wealth management. Professionals may analyze securities, manage portfolios, or provide financial advice.

RISK MANAGEMENT & INSURANCE. Identify, evaluate, and manage financial and operational risks. Professionals help organizations and individuals protect assets, manage uncertainty, and plan for potential losses.

REAL ESTATE. Support activities related to real estate investment, development, financing, property management, and market analysis. Real estate remains a significant asset class for both businesses and individuals.

PRIVATE EQUITY, ASSET MANAGEMENT, & ALTERNATIVE INVESTMENTS.

Private equity professionals acquire and grow businesses to create value, while asset managers oversee investment portfolios across a variety of asset classes. These fields focus on balancing risk and return to achieve investment objectives.

PREPARING FOR YOUR CAREER...

AS CITED BY TOP AREA RECRUITERS, YOU WILL NEED:

- Knowledge of financial markets and financial statements
- Strong analytical, quantitative, and problem-solving skills
- Ability to analyze data and communicate actionable insights
- Proficiency in Excel and financial analysis tools, including with the use of AI
- Strong communication, teamwork, and professional judgment

SHOWING EXPERTISE IN FINANCE

The CFP®, CFA®, CIMA®, CLU®, ChFC®, and CPA designations are examples of widely recognized finance and investment credentials.

UNC Charlotte's Financial Engineering and Fintech Early Entry program allows students to save time and money by starting graduate studies as early as their junior year.

You might enjoy finance if you did well in algebra or statistics; you're a whiz at spreadsheets and AI tools; you like to set long-term goals; people call you a problem-solver; you're able to set and keep a budget; you work well under pressure; you like negotiating and working with people

RIGHT NOW IN FINANCE

CHARLOTTE IS THE 2ND-LARGEST BANKING CENTER IN THE U.S., WITH A MAJOR CONCENTRATION OF BANKING AND FINANCIAL SERVICES FIRMS DRIVING STRONG REGIONAL OPPORTUNITY.

DEMAND REMAINS STRONG IN COMMERCIAL BANKING, WEALTH MANAGEMENT, AND FINANCIAL SERVICES, WITH CONTINUED GROWTH IN DATA-DRIVEN AND ADVISORY ROLES.

CHARLOTTE'S BROADER FINANCIAL ECOSYSTEM, INCLUDING MULTIPLE FORTUNE 500 HEADQUARTERS, SUPPORTS CAREERS IN CORPORATE FINANCE, REAL ESTATE FINANCE, AND RELATED FIELDS SUCH AS UNDERWRITING AND ASSET MANAGEMENT.

PROFESSIONAL CREDENTIALS SUCH AS SECURITIES OR INSURANCE LICENSING CAN ENHANCE CAREER OPPORTUNITIES AND ADVANCEMENT IN THE FIELD.

QUICK FACTS FOR FINANCIAL ANALYSTS:

FIELD GROWTH:

+8% NATIONALLY

BRIGHT OUTLOOK IN NORTH CAROLINA

NC SALARY RANGE: \$63,380- \$159,910

MEDIAN NATIONAL INCOME: \$99,010

THIS DATA REFLECTS ALL WORKERS AND LONG-TERM EARNING POTENTIAL.

SOURCE: ONETONLINE.ORG, BLS.GOV

UNC CHARLOTTE GRADS



84% of Charlotte Finance Alumni 1-5 years out work in a field related to their program of study, with a median income of \$74,000. Top alumni skills include finance, accounting, financial analysis, data analysis, and financial statements.

*Lightcast Data, 2021-2026



GET INVOLVED!
STUDENT ORGANIZATIONS &
PROFESSIONAL ORGANIZATIONS

ON CAMPUS

STUDENT MANAGED INVESTMENT FUND AT UNC CHARLOTTE

STUDENT ORGANIZATIONS

BETA ALPHA PSI (FINANCE)

GAMMA IOTA SIGMA

INVESTMENT CLUB AT UNC CHARLOTTE

QUANTITATIVE FINANCE CLUB

PROFESSIONAL ORGANIZATIONS

SOCIETY OF FINANCIAL SERVICE PROFESSIONALS

FINANCIAL PLANNING ASSOCIATION OF CHARLOTTE

ASSOCIATION FOR FINANCIAL PROFESSIONALS

RISK MANAGEMENT ASSOCIATION

RISK & INSURANCE MANAGEMENT SOCIETY

URBAN LAND INSTITUTE (ULI)

INSTITUTE OF REAL ESTATE MANAGEMENT (IREM)

COMMERCIAL REAL ESTATE WOMEN NETWORK (CREW)

NATIONAL ASSOCIATION OF INDUSTRIAL AND OFFICE PROPERTIES (NAIOP)

WHO HIRES UNC CHARLOTTE FINANCE MAJORS?

BANK OF AMERICA 

**WELLS
FARGO**

 **TIAA**

 **LPL Financial**

TRUIST 

 **COMPASS
GROUP**

**forv/s
mazars**

AMWINS™


Gallagher

 **CUSHMAN &
WAKEFIELD**

ally®

 **First Citizens Bank**

Internships make candidates more competitive in the job market, and many employers hire entry level positions from their internship programs. More information can be found at belkcollege.charlotte.edu/internships

SAMPLE JOB TITLES IN FINANCE

FINANCIAL ANALYST • CREDIT ANALYST • FINANCIAL ADVISOR
WEALTH MANAGER • RISK MANAGER • INSURANCE UNDERWRITER
REAL ESTATE ANALYST • DATA ANALYST • TRADER • ACTUARY
M&A ANALYST • FINANCIAL EXAMINER • FINANCIAL MANAGER
LOAN OFFICER • RELATIONSHIP MANAGER • INSURANCE AGENT