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## Undergraduate and Recent Graduate Story Templates – Engineering or a Technical Major to Investment Banking

You can use this template if you're an undergraduate or recent graduate from an **engineering or technical background**, and you're interviewing for investment banking positions.

With this background, bankers won't question your **math skills**, but they will be skeptical of other points:

- **Can you talk to people?** Do you have social skills? Can you write emails and speak with clients, or can you only make calculations?
- **Can you put in the hours?** Are you willing to work 80+ hours per week rather than the 50-60 (or less) you'd get at a technology company?
- **Are you really interested in finance?** Or did you just "get interested" when you realized that you could make more money in banking?

The Growing Interest section of your story should answer these objections, and The Beginning should establish that you've had an interest in finance or business for a long time.

Many engineers do break into finance, but they have almost always done *something* business-related in the past.

So if you have absolutely nothing related to business, accounting, finance, or investing, you need to get that experience first to have a good shot.

Here's the outline, the full template, and an executed example of this template from a client:

### OUTLINE:

- **Beginning:** Where you're from, your university, and your internships/activities. Insert a brief mention of some interest in finance at a younger age.
- **Spark:** A banker you met, an internship project, or an activity or class that sparked your interest in finance.
- **Growing Interest:** Networking with bankers, self-study of the technical side, stock-market investing, case competitions, etc.; also give a short example of how you can handle the hours.



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- **The Future and Why You're Here Today:** You want to combine your engineering skill set with finance and advise companies on major transactions, ideally in a related industry, such as TMT, industrials, or healthcare.

#### FULL TEMPLATE:

**Interviewer:** Why don't you start by walking me through your resume?

**Interviewee:** "Sure. So I'm from **[Location Name]** originally, and then I went to **[University Name]** and majored in **[Major Name]**, since I originally wanted to work in **[Technology, healthcare, aerospace, etc.]** after graduation. I was also very interested in finance because **[My family member was involved / I traded stocks or invested / I did some other business-related activity.]**

I did my first internship at **[Company Name]** and did **[Something technical, but also something where you interacted with customers or otherwise made an impact on sales]**. I started becoming more and more interested in the business side because **[Point to specific results, such as improving profits or sales, or conversations with customers, suppliers, etc.]**.

I started to think about combining my engineering skills with my interest in business, so back at school, I **[Joined the student investment fund, the business fraternity, started doing case competitions, took accounting and finance classes, etc.]** and also completed an internship at **[A small VC/PE firm, hedge fund, or something else related to finance]**. I liked the financial modeling and valuation work there, but I also **[Wanted to work on larger deals, spend more time working on deals rather than monitoring portfolio companies, see the results of my work, etc.]**, so I became more interested in investment banking.

I know what I'm getting into in terms of the hours, since I often worked and studied 70 hours per week when I **[Did my internship and took classes at the same time, or point to some other period of extended hours]** – and I'm confident I've taught myself enough finance to contribute.

So I'm here today because I want to combine my engineering skills with what you do in investment banking, and advise **[Industry Name]** companies on their M&A and financing strategies.

And joining your firm, given the deals you've worked on, like **[Name a Deal]**, is the ideal way for me to get there."

#### EXECUTED EXAMPLE OF THIS OUTLINE AND TEMPLATE:



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Here's a slightly modified version of the story of one client who broke into investment banking from an electrical engineering background:

**OUTLINE:**

- **Beginning:** From China originally, went to UC Berkeley, majored in EE, and had an interest in finance due to his uncle's import/export business in China.
- **Spark:** Worked at Lockheed Martin doing technical writing, and helped customers save money in the satellite testing process.
- **Growing Interest:** Joined the business fraternity, did a school-year internship at a tech-focused hedge fund, and participated in a Goldman Sachs case competition.
- **The Future and Why You're Here Today:** He wants to combine his TMT and aerospace background with his finance experience and advise tech companies on their expansion and financing strategies.

**FULL STORY:**

**Interviewer:** Why don't you start by walking me through your resume?

**Interviewee:** "Sure. So I'm from China originally, moved to the U.S. in high school, and went to Berkeley to major in electrical engineering, since I've always been interested in technology. I was also very interested in finance because my uncle ran an import/export business in China that worked with a lot of industrial companies.

In my first internship, I worked at Lockheed Martin doing technical writing to help customers understand the products. But in the process, I became a lot more interested in the business side because some of my recommendations helped customers test satellites 20% more efficiently and save money.

I started to think about combining my engineering skills with my interest in business, so back at school, I joined Delta Sigma Pi, the business frat, did a Goldman Sachs case competition, and also completed a school-year internship at Oak Road Brothers, a tech-focused hedge fund. I liked the financial modeling and valuation work there, and getting to look at companies creatively, but I also wanted to work on longer-term projects and actually influence companies' strategies – so I've become most interested in investment banking.



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I know what I'm getting into in terms of the hours, since I often worked and studied 70 hours per week when I did my school-year internship and took 5 classes at the same time – and I'm confident I've taught myself enough finance to contribute.

So I'm here today because I want to combine my engineering skills with what you do in investment banking, and advise technology companies on their M&A and financing strategies.

And joining Qatalyst Partners, given deals you've worked on, such as Oracle's acquisition of NetSuite, is the ideal way for me to get there."