

Recruiting Networking Templates Guide



Table of Contents

Introduction..... 3

After Information Session..... 4

Cold Calls and Emails 8

Holiday Greetings..... 13

Bank-Specific Emails 14

Interviews 19

Offer! 20

Introduction

Networking and following-up are central parts of breaking into the field of finance, starting with first round interviews. What you are about to read are strategies and templates that have been compiled and used effectively by students to successfully break into an ultra-competitive industry. Feel free to utilize and adapt these templates for your use at the appropriate times but always remember to have your voice and good personality shine through.

The networking process also hones key skills, such as being able to talk intelligently about financial news, and presents an opportunity to practice interview questions like “walk me through your resume” or “why investment banking”. The process will also allow you to leverage the name of the bankers and the unique information they give you to impress interviewers and show that you really do want it. Network now and network often, even after receiving the offer—you never know when that analyst/associate/VP will go up to bat for you in the future.

Don't forget about the recruiter, as they are usually the ones who pass along resumes to the analysts that review. They can also forward your information to other bankers who you can network with. Be friendly with the recruiters and thank them via email or in person after information sessions, follow-up with requests to connect with other bankers and don't send more than 4 emails. Remember not to be annoying. Little things matter, like happy holidays greetings and being sensitive to the time zone differences.

Pay attention to the Bank-Specific Email section for additional insights and email threads, including how to check-in with bankers before networking calls.

Networking will be especially important to international students and the process will be especially harder because of sponsorship issues. Keep up the good fight and show you want it more than the guy next to you!

Getting that offer in finance can be a waiting game so maintain a level head (as much as you can) and pursue the wealth of opportunities!

After Information Session

Night of / 24 Hours

Hi George,

It was a pleasure to meet you at the networking event at [insert School Name]. Thank you for coming out--I was so happy to hear that we had the same experience at Ernst & Young Transaction Advisory VBM. TAS has given me a great exposure to different kinds of valuation techniques to complement my own individual studies in finance. I also have some experience working with EY Financial Services Office (FSO) on their projects regarding ASEAN integration and banking consolidation in the Philippines. I enjoyed our conversation on your background and career path prior to JP Morgan.

Working with the Transaction Advisory team on their deals got me highly interested in Investment Banking at JP Morgan, and the larger deals and greater responsibility at the firm excites me. I hope to keep in touch with you throughout the recruiting process and look forward to connecting again soon.

Best,

--

Hi Jonathan,

It was nice meeting you at the JP Morgan networking event at [insert School Name]. Thank you for taking the time out of your schedule to come and speak to us about your experiences. I am very interested in the investment banking summer analyst position, and I am preparing for the application process. My experiences last summer with Ernst & Young's Transaction Advisory team exposed me to deals and extensive valuation work.

I particularly liked our discussion on the market outlook for the auto industry, especially on the deal flow in emerging markets--it was great to hear your insights and background prior to banking. I appreciate your time and look forward to seeing you again at future events.

Best Regards,

--

To Recruiter

Hi Amanda,

It was a pleasure to meet you at the Credit Suisse networking event at [insert School Name]. Thank you for taking the time out of your schedule to come and speak to us about your experiences and on the opportunities for undergraduates at Credit Suisse.

I was able to meet amazing analysts and associates at the company, such as Paul Dexter and Jaewon Chung. In particular, I was able to have a great conversation with Paul on his thoughts on the M&A market and whether the strong valuations and deal flows would continue. We also had an interesting discussion on transactions in the secondary market, which have been quite active and in high volumes lately.

Just to follow-up on our talk--I was wondering if you could connect me to people in the healthcare or FIG coverage group, Investment Banking division. I am very interested in a summer analyst position in these groups and would like to get more information and speak to someone.

Throughout the ongoing recruiting process, I look forward to learning more about the company and getting involved with Credit Suisse.

Best Regards,

--

Hi,

It was a pleasure to meet your colleagues and the Goldman Sachs Investment Bankers at the Goldman Sachs networking event at [insert School Name]. Thank you for taking the time to organize and shed light on the opportunities for undergraduates at Goldman Sachs.

I was able to meet amazing professionals at the company, such as Jacob Munoz of FIG and Tony Pulice. In particular, I was able to have a great conversation with Tony on his deal work and his background as a consultant prior to Goldman Sachs. I worked at Ernst & Young in their Transaction Advisory team, where I dealt with financial institutions, and I was able to convey my interest in FIG to Jacob and learn about his background prior to Goldman.

I was wondering if you could connect me to people in the New York office, Investment Banking division. I am very interested in a summer analyst position there and would like to get more information and speak to someone.

Throughout the ongoing recruiting process, I look forward to learning more about the company and getting involved with Goldman Sachs.

Best,

--

Two Week Follow-up Chat

* Follow-up phone call after two weeks to solidify connection and ask for a referral to the recruiting team. Let them know that you have already applied on Career Advancement/their website. Don't forget to wish them happy holidays if there is a one coming up

Hi George,

I wanted to follow-up and let you know that I recently read that U.S. coal producers are now looking to export coal internationally, especially as natural gas prices are higher outside the U.S.--I found the article really interesting and was able to tie it back to investment banking and the work that you do.

On that note, I wanted to again express my strong interest in Investment Banking and was wondering if you had 15 minutes for a phone chat so that I can learn more on how to best position myself for the summer analyst interview.

I have also attached my resume for your reference and guidance. I look forward to hearing from you soon.

Best Regards,

--

Dear Tony,

I wanted to follow-up and let you know that I recently read an article on Goldman Sachs and its significant role in the recent Allergan and Halliburton deals--I found the article engaging, particularly the advisory work of Goldman on the side of Baker Hughes and the Halliburton deal's regulatory debate, and was able to tie it back to investment banking and the work that you do.

On that note, I wanted to again express my strong interest in Goldman Sachs Investment Banking and was wondering if you had 15 minutes for a phone chat to talk more on this very interesting deal sometime next week after the holidays.

I am also attaching my resume for your reference and guidance. I look forward to hearing from you soon.

Happy Thanksgiving and Best Regards,

--

Hi Paul,

I wanted to follow-up and let you know that I recently looked at an article on Dealogic regarding US M&A volume totaling \$1.41tr in 2014 YTD, up 43% from 2013 YTD with Healthcare and Telecom and Technology as the larger targeted sector. I found the article and the note on cross-border transactions really interesting and was able to tie it back to investment banking and the work that you do.

On that note, I wanted to again express my strong interest in Investment Banking and was wondering if you had 15 minutes for a phone chat so that I can learn more on how to best position myself for the summer analyst recruiting cycle.

I look forward to hearing from you soon.

Best Regards,

--

Cold Calls and Emails

Initial Contact

Hi Lingling,

I was referred to you by _____ and I found your information from the [insert School Name] alumni database search. I am reaching out to learn more about your bank and your experiences--would you have 15 minutes for a phone chat? I would really appreciate your time.

My experiences last summer with Ernst & Young's Transaction Advisory team exposed me to deals and valuation work. I am interested in an investment banking summer analyst role, and I'd like to ask a few questions about your work and how to best prepare for the upcoming recruiting cycle.

Please find attached my resume for your reference. Hope to hear from you soon.

Best Regards,

--

Hi Ananya,

I am [insert Student Name], a student at the [insert School Name] studying Economics and Political Science. I was able to talk to Andrew Stevenson, a [insert School Name] alumni in Barclays DCM, and he recommended me to talk to you and other senior professionals at the firm to learn more about Barclays Investment Banking and your experiences at the company. I am currently preparing for the summer analyst recruiting cycle for Barclays.

I was wondering if you would have 15 minutes for a phone chat? I would really appreciate your time. I'd like to ask a few questions about your work.

From my research on the company and chats with analysts, Barclays has emerged as one of my top choices with its great transaction work and client interactions. I have also attached my resume for your reference and guidance. I hope to hear from you soon.

Sincerely,

--

Hi James,

I found your information from the [insert School Name] alumni database search, and I am reaching out to learn more about JP Morgan and your experiences as an analyst--would you have 15 minutes for a phone chat? I would really appreciate your time. I was able to meet professionals from the Chicago office during the JP Morgan information session and our conversations sparked my interest in the coverage groups like diversified industries.

My experiences last summer with Ernst & Young's Transaction Advisory team exposed me to deals and valuation work. I am interested in an investment banking summer analyst role, particularly at JP Morgan New York. I'd like to ask a few questions about your work and your group.

Please find attached my resume for your reference and guidance. Hope to hear from you soon.

Best Regards,

--

For Recruiters

Hi Julie,

My name is [insert Student Name], currently an undergraduate at the [insert School Name]. Fiona Holdcroft mentioned you as a resource for questions on Global Capital Markets internship recruiting at Morgan Stanley.

I am very interested in the Morgan Stanley Global Capital Markets summer analyst position and was wondering if you could connect me to people currently in the group for me to engage with and talk on their experiences.

I have been following the strong deal trends this year (particularly the boom in M&A for the healthcare sector), and Morgan Stanley has advised on the Valeant Pharmaceutical International Inc. - Allergan takeover, a deal that I am currently looking at. I have also applied for the summer analyst position through the Morgan Stanley website and through [insert School Name] career advancement.

Throughout the ongoing recruiting process, I look forward to learning more about the opportunities and getting involved with Morgan Stanley.

Have a great day,

--

Hi Abby,

Hope you are having a great day, I just wanted to follow-up on my last email--

I was wondering if you could connect me to people in the New York office, Investment Banking division. I am very interested in a summer analyst position there and would like to get more information and speak to bankers on their work and the exciting recent deals Goldman has advised, particularly the \$34.6 billion Halliburton deal. .

Throughout the ongoing recruiting process, I look forward to learning more about the company and getting involved with Goldman Sachs.

Best,

--

After Phone Chat

Hi Nonie,

Thank you for our talk this morning and for your advice. I really appreciate your time and insights on the analyst position and on your exciting professional experiences. The discussion was very helpful and I hope to keep up my preparation and networking efforts.

Thank you as well for the support and have a great day!

Best,

--

Follow-up on Phone Chat Email

Hi,

I wanted to follow up on my previous email--I know that you are extremely busy and thank you for taking the time to read this email in the first place.

I just wanted to again express my strong interest in Investment Banking. I would also like to let you know that I have submitted my application on the [insert School Name] career advancement website and on the JP Morgan website.

On that note, I am very passionate about investment banking and excited about JP Morgan. I hope for an opportunity to interview and ultimately add value to the company.

Best Regards,

--

Referral Phone Chat Email

Hi Andrew,

Thank you for our talk and for your advice. I really appreciate your time and insights on the analyst position and on your professional experiences. The discussion was very helpful and I hope to keep up my preparation and networking efforts.

I did more searching on LinkedIn and found Raymond Raimondi, the [insert School Name] Alum who is an MD in industrials. I hope to contact him and more people and set up quick phone chats to learn more about their work and convey my interest in the firm.

Thank you again and have a great day!

--

Dear Mr. Raimondi,

I am [insert Student Name], a student at the [insert School Name] studying Economics and Political Science. Andrew Stevenson, a [insert School Name] alumni in Barclays DCM, recommended me to you to learn more about Barclays Investment Banking and your professional experiences at the company. I was able to talk to Andrew on his interesting work in DCM and I am currently preparing for the summer analyst recruiting cycle for Barclays.

I was wondering if you would have 15 minutes for a phone chat? I would really appreciate your time. I'd like to ask a few questions about your work.

From my research on the company and chats with analysts, Barclays has emerged as one of my top choices with its great transaction work and client interactions. I am very interested in the M&A and the Industrial groups.

I have also attached my resume for your reference and guidance. I hope to hear from you soon.

Sincerely,

--

Already Applied Email

Hi Lee,

Thank you for your email.

I recently just applied and submitted my resume on both the career advancement website and the JP Morgan website.

I appreciate all the advice and insights you gave me and I look forward to incorporating these should I be lucky to get an interview at JP Morgan.

Thank you for your time and look forward to hearing from you soon,

--

Holiday Greetings

Dear _____,

This is [insert Student Name] from the [insert School Name]--I just wanted to follow-up on our conversation at the [insert School Name] and wish you a Happy Thanksgiving!

Recruiter Holiday Emails

Hi Amanda,

Hope you are doing well.

I just wanted to again express my strong interest in Credit Suisse. I have applied for the investment banking position on the Credit Suisse website and on the [insert School Name] careers website. My research on the company and discussions with bankers, particularly Andy Han and Sawyer Kissen, from the M&A group were very insightful and I look forward to continuing the conversation.

I also want to wish you a happy upcoming holidays!

Best,

--

Bank-Specific Emails

Lazard

Hi Ozan,

Thank you for your email! Saturday this weekend would be fine, please let me know how your schedule looks.

I was also able to chat with Rohan Sharma on his experiences and my strong interest in Lazard- I am very excited to continue the conversation with you!

I'd also like to wish you a Happy Thanksgiving and a great day,

--

Hi Ozan,

Thank you very much for your time last night and for your insight on the analyst experience at Lazard Middle Market!

It was great speaking with you and Rohan on the experience at Lazard and its M&A practice, which aligns very well with my interests. I particularly loved our talk on the culture of the office and on your lead role in the deals since you started with Lazard. I really appreciate our conversation, as I have Lazard as a top choice moving into the recruiting season.

I also wanted to attach an updated resume (I know that Lazard wanted us to list relevant coursework).

I realize that the office is quite busy, but I'd also be very interested in talking to an associate/VP on their work at Lazard Middle Market and get their perspective.

Thank you again for the assistance!

Best,

--

Greenhill

Dear Jordan,

I am writing to again express interest in the Greenhill Investment Banking Summer Analyst--I have applied and submitted my resume on the [insert School Name] career advancement website.

Greenhill's multinational and entrepreneurial culture, as well as its strong deal teams that have advised on many major acquisitions, set the firm apart from others in its space and excites me for the position.

My summer experience at Ernst & Young's Valuation and Business Modeling team has furthered my interest in investment banking and exposed me to valuation and deal experience.

I have also reached out to Lokesh Anand, a current analyst, on the possibility of a chat on his experiences at the company, especially coming from [insert School Name]. I would love an opportunity to interview and continue the conversation.

Best Regards,

--

UBS

Dear Jerrel,

I would just like to thank you for our chat last week--I really appreciate the insights you have given me on your work and on the exciting direction of UBS. From my research and conversations, UBS has become a top choice bank for me moving into the recruiting season.

On that note, I have submitted my application on the UBS website and really value your support.

Best regards and have a happy upcoming holiday,

--

Hi Jerrel,

I have sent an invite (hopefully, Google works) and have it scheduled on Thursday. I also wanted to attach an updated version of my resume to guide our conversation.

Looking forward to our chat!

Best,

--

J.P. Morgan

Hi Steph,

I just wanted to follow-up and thank you for our chat yesterday. Thank you for taking time out of your busy schedule to speak to me--I really appreciate your insights on JP Morgan and on your experiences as an analyst. The discussion was very helpful!

JP Morgan is a top choice bank for me and talking to you and the other JP Morgan analysts gave me a great perspective on the firm and its work. I look forward to continuing the conversation and will keep you updated.

Best regards and have a happy holidays,

--

Deutsche Bank

Dear Cameron,

I just wanted to follow-up and thank you for our chat earlier this week--I really enjoyed our conversation on the Industrials group and on the concerns for clients in the current macroeconomic environment.

I really look forward to continuing the conversation. I have been networking with Deutsche Bank bankers from New York and the discussions have been great so far. In particular, I was able to chat with Will Straatman and Giannina Sy, analysts at the New York office. The firm's great culture, people, and deals are reasons why the bank has emerged as a top choice for me!

That being said, I have already applied for the summer analyst program on [insert School Name]'s career website and on the Deutsche Bank website. I appreciate all the advice and insights you gave me, and I look forward to incorporating these should I be lucky to get an interview at Deutsche Bank.

Best,

--

Goldman Sachs

Dear Kaushik,

Thank you for our conversation this morning--it was great to hear your insights on the FIG group at Goldman Sachs and some of the very interesting transactions you were involved in.

I look forward to incorporating these insights should I be lucky to get an interview at Goldman. FIG has become a top choice for me as it aligns with my interests, and I loved speaking to you and Jacob Munoz on your experiences. I was also able to meet Andre Kelleners and Tony Pulice who are part of the recruiting team, which gave me a great sense of the culture at Goldman.

Please find attached my resume--I greatly appreciate your support and will keep you updated. I also wanted to wish you a happy upcoming holiday!

Best Regards,

--

Dear Mr. Kelleners,

Hope you are doing well--I just wanted to quickly follow-up from the Goldman Sachs information session and wish you a happy upcoming holidays.

I would like to again express my strong interest in Goldman Sachs. I have applied for the investment banking position on the Goldman Sachs website and on the [insert School Name] careers website.

My research on the company and discussions with bankers, particularly Tony Pulice and Kaushik Ravi, were very insightful and I hope to continue the conversation. Kaushik and I had a great conversation on the expectations for FIG in the coming year and on his exciting work with the group. Goldman Sachs is a top choice for me moving into the recruiting season and I look forward to becoming more involved with the company.

Best Regards,

--

Bank of America Merrill Lynch (BAML)

Hi Andrew,

I just wanted to follow-up and thank you again for the call. I really appreciate our talk on your experiences and the insight on the top groups at Bank of America.

Since our conversation, I have been doing more research and reading up on Bank of America's significant deals and involvement--one recent transaction that struck me was BAML's role as the sole bookrunner in the Telefónica SA sale of a 2.5% stake in China Unicom for \$875 million. The move was interesting because of Telefónica's multiple recent acquisitions in Europe and Latin America--the divestiture could be a means of strengthening their financial position ahead of other potential acquisitions in certain markets driven by industry consolidation. I also found the transaction a testament to BAML's relationships, having advised Telefónica's German unit in a prior telecom acquisition, and multinational reach.

On that note, I wanted to again express my strong interest in BAML and ask for advice on how to best position myself for the firm's recruiting cycle. I have reached out to bankers, including Booth Alumni, and would love an opportunity to continue the conversation.

Best Regards,

--

Interviews

Follow-up with Interviewer

Dear Jordan,

Thank you for the opportunity to interview with you and Greenhill today, I greatly appreciate the insights from our discussion. I really enjoyed our conversation on your deal work and the culture of the bank, which have resonated strongly with my interests.

The focus on M&A and the collegial, multinational culture at Greenhill are reasons why the bank has emerged as a top choice for me.

Thank you once again for your consideration. I would also be happy to give references or a recommendation letter to support my application.

Have a great day,

--

Offer!

Continuing the Conversation

Dear Fitz,

I just wanted to thank you for the incredible opportunity to join the investment banking team this summer--it really means a lot to me and I am very excited! I did want to ask if you would be free for a quick chat? I just wanted to ask some more questions on the group and how best to prepare for the work this summer.

Please let me know if you have any availabilities in the coming days. I am mostly free Mondays, Wednesdays, and Fridays. I can also do Tuesdays after 4pm. I realize that you are very busy and if a time does not work, I'll do my best to move around my schedule.

Best,

--

Dear Andrew,

Hope you are doing well--I've recently received summer offers from investment management firms and banks, with one in a DCM role. I wanted to reach out and ask if would be free to chat about your experience in DCM and ask more in-depth questions about the role and how you like it.

Please let me know if you have any availabilities in the coming days. I am mostly free Mondays, Wednesdays, and Fridays. I can also do Tuesdays after 4pm ET. I realize that you are very busy and if a time does not work, I'll do my best to move around my schedule.

Best,

--

Declining an Offer

Hi Callie,

I hope that everything is well--I just wanted to let you know that I have decided to go with an alternative option but would like to thank you and the team for the amazing recruiting experience at Morningstar.

That bring said, I would still like to keep in touch--I really appreciate everything and was impressed by the people and work culture of Morningstar. I will keep Morningstar's products and programs in mind for the future.

Best Regards,

--