Simon Fraser Investment Club Hiring Package
Summer 2025 Intake

Who We Are

The Simon Fraser Investment Club ("SFIC") is a student organization providing opportunities for professional and technical development in high finance. We are seeking students who are passionate about investing, global markets, corporate finance, market research, and/or economics.

The club's activities include investment research delivered through equity research reports or stock pitches, special networking and technical development training, and finance-specific resume and interview preparation for club members participating in recruiting. Aside from the research and operations teams, public events will also be held throughout the year.

Hiring

SFIC has assembled a preliminary team to begin fully operating in October 2025. The team is split into operations and research teams.

Research is responsible for producing reports in the form of equity research reports or stock pitches. Research team members are expected to produce one of these reports each in both the fall and spring semesters. Reports may be prepared individually or with other research team members. It is encouraged that stock pitches are prepared for use in a local or international stock pitch competition to ensure research team members get the most value out of their work. The team is segmented into broad sector groups allowing for members to concentrate on their areas of interest.

Operations is responsible for managing club operations and running events. This includes managing internal and external relations between the club and various stakeholders, organizing events and training sessions, coordinating activities, and performing various essential functions including marketing and administration. The team is structured with each member being responsible for a function within the group.

What We Offer

As team members of SFIC you will:

- Have exclusive access to network with professionals at events,
- Access to exclusive resources to guide you through your recruiting process,
- Be surrounded by people who are like minded and who share similar goals,
- Be supported by your team through your recruiting journey by helping with interview prep, resources and any other advice we have to offer.

This club would be perfect for students looking for a career in Investment Banking, Private Equity, Hedge Funds, Sales and Trading, or any other high finance careers upon graduation. Joining our community would help you navigate and optimize that path.

Expectations of Team Members

As team members of SFIC you will be expected to:

- Communicate with your teammates in a timely and complete manner,
- Communicate your capacity to carry out your tasks, as defined by your role,
- Be supportive of your fellow teammates in their tasks,
- Be willing to share recruiting advice and resources,
- Be willing to help others achieve their career goals.

All candidates will be required to sign a contract certifying these expectations upon receiving an offer.

The following positions are currently seeking applications to be filled for the period from **September 2025** to **April 2026** *(Certain executive positions may begin in June-July)***:**

Research:

- Equity Research Analyst(s) & Senior Equity Research Analyst(s)
- Group Head, Research

Operations:

- Associate, Marketing

Job Descriptions are Located in the Following Pages. For Information on how to Apply, please see page 5.

Research Team: Equity Research Analyst

Equity Research Analysts make up the bulk of the research team, and will deepen their understanding of finance and capital markets through the production of research reports as well as participating in other activities, including club meetings, technical training, events, and competitions. Analysts are expected to create one research report or stock pitch per semester; these will be published on the SFIC website.

The ideal Equity Research Analyst would:

- Be very passionate about capital markets and investing,
- Have interest in pursuing a career in capital markets, for example in Equity Research, Sales & Trading, Investment Banking, Private Equity, Asset Management, Hedge Funds, Corporate Finance, Quantitative Finance, Investor Relations, and related careers,
- Desire to spend a significant amount of time learning qualitative and quantitative aspects of finance,
- Be interested in participating in competitions and presentations,
- Be interested in collaborating with others in a team environment.

Tell us in the interview if you:

- Have experience working in finance, including relevant internships,
- Have competed in stock pitches, finance-focused case competitions, or related ventures,
- Have produced stock pitches and/or equity research reports, either for competitions or as a passion project,
- Have financial modeling experience, either through coursework, employment or other means,
- Have experience using S&P CapIQ or Bloomberg,
- Are interested in a specific sector/industry,
- Have any other experiences you believe qualify you for the position.

The time responsibility of the research team will vary and is highly flexible. Analysts can expect to spend a significant amount of time on their reports, and analysts recruiting for finance internships/roles can expect support from other members.

The organizational structure of the research team is relatively flat; however analysts can expect direction from their group head or from the president of research.

Note: most equity research analysts will be hired during our hiring period in August & September. We will consider applications now but will defer most applications to the next semester.

Research Team: Group Head of Equity Research

The Group Heads of Equity Research would be responsible for leading and supporting a small group of analysts. Research Group Heads need not be experienced professionals, but should have some level of experience and/or technical understanding that would allow them to support others. Group heads should also be passionate about leadership and mentorship, and may be called upon to assist in training new analysts, or training at public events.

The Group Heads of Equity Research would...

- Be very passionate about capital markets and investing,
- Have interest in pursuing a career in capital markets, for example in Equity Research, Sales & Trading, Investment Banking, Private Equity, Asset Management, Hedge Funds, Corporate Finance, Quantitative Finance, Investor Relations, and related careers,
- Have an ability to produce stock pitches and reports, and help others do so,
- Lead a team of analysts to cover a certain sector or sector group,
- Facilitate those who are competing on behalf of the SFIC,
- Be interested in collaborating with others in a team environment.

Tell us in the interview if you:

- Have experience in leadership roles,
- Have experience working in finance, including relevant internships,
- Have competed in stock pitches, finance-focused case competitions, or related ventures,
- Have produced stock pitches and/or equity research reports, either for competitions or as a passion project,
- Have financial modeling experience, either through coursework, employment or other means,
- Are interested in a specific sector/industry,
- Have any other experiences you believe qualify you for the position.

The time responsibility of a group head will be significant. Groups heads will be expected to take the lead and ensure reports are completed each semester, and provide guidance to analysts. Group heads should expect to be meeting with analysts as well as with other group heads on the research team to determine the direction of the research team.

Those applying to a group head position will also be considered for other analyst positions.

The organizational structure of the research team is relatively flat. Analysts will report to the group head. The group heads will report to Jake Melo Valinho, President of Research.

Operations Team: Associate, Marketing

The Marketing Associate assists with the duties of the marketing department, which is responsible for a variety of important tasks including branding, raising awareness, and ensuring the success of our mission. The marketing associate would get a variety of hands-on experiences working to build and grow the club, and would have a fair amount of freedom to accomplish this. The marketing associate would also interface with other directors on the operations team.

The responsibilities of the Marketing Associate Include:

- Building graphic design works for social media posts, banners, etc,
- Assisting the development and implementation of marketing strategies to boost events, membership, and brand visibility,
- Create and manage content for social media, emails, and the website,
- Coordinate promotional materials,
- Analyze campaign performance and adjust strategies based on data,
- Manage marketing budgets efficiently in association with other operations team members,
- Assisting the Marketing Director in any tasks assigned to them,
- Be interested in collaborating with others in a team environment.

Tell us in the interview if you:

- Have graphic design experience, including technical experience in the Adobe suite, Figma, Canva, or other tools,
- Have worked in marketing, social media management, or a related field,
- Have practical experience managing organizational marketing, including social media for clubs, organizations or companies, or any other applicable experience,
- Have experience managing multiple tasks and deadlines simultaneously,
- Have any other experiences you believe qualify you for the position.

The time responsibility of this position would vary but would typically range between 4-6 hours per week, with variation based on when events or marketing programs are being run.

The Marketing Associate would sit within the marketing team and report to the Director of Marketing

Important Information: How to Apply

Deadlines: Applications for this intake period will be accepted until Wednesday, October 1st, 11:59 PM PST. Applications sent in after that time may not be considered.

What You Need to Apply: A copy of your resume (1 page maximum for research team applications, 2 page maximum for operations team applications) in PDF format, 2-3 application questions, completed form. There will also be an optional section for additional materials you may want to share; this might include past case competition decks, research reports made in class or as a personal project, or other materials. Please do not include sensitive documents.

If you have not yet created a finance-specific resume, please refer to our resume guides on our website. First-Year and applicants newly interested in finance should pay special attention to this.

Application Form: The Application form can be found at this link.

Interviews: Applications will be reviewed and processed with interviews scheduled for October. Interviews will be conducted by one or more team members. Interviews for the research team will include optional technical questions; however consideration will be given to all students. First-year applicants will not be asked technical questions unless they specifically request it. All other research team applicants ***will*** be asked basic technical questions. For more information, view our website's interview resources, especially the "WSO Technical Questions".

Offers: Offers will be handed out by October 8th, 2025 after the conclusion of all interviews.

Should you have any questions or concerns, please email Keith Vermeulen or Jake Melo Valinho at our club email: **investmentsfu@gmail.com.**

The SFIC is committed to fostering a diverse and inclusive environment. We believe that the strength of our team comes from the variety of perspectives, backgrounds, and experiences that each member brings. We encourage anybody interested who feels they meet some or all of the criteria to apply.