



Breaking Into Wall Street Courses

How to List the Courses on Your Resume/CV

Here are our **recommended templates** for describing each BIWS course on your resume or CV:

- **Step 1: Select the Course(s) You Want to List**
- **Step 2: Decide on the Short Version or the Long Version**
- **Step 3: Select the Appropriate Template(s) and List Them on Your Resume**
 - Excel & VBA – Template
 - Core Financial Modeling – Template
 - Advanced Financial Modeling – Template
 - PowerPoint Pro – Template
 - Project Finance Modeling – Template
 - Venture Capital & Growth Equity Modeling – Template
 - Bank & Financial Institution Modeling – Template
 - Real Estate Modeling (Properties) – Template
 - REIT Financial Modeling – Template
- **Step 4: Modify the Template(s) as Appropriate**
- **Step 5: Any Questions?**

Step 1: How to Select the Course(s) to Write About

If you have only completed one course, write about that course.

If you have completed multiple courses – for example, Core Financial Modeling and Real Estate Modeling – you should list a course based on:

- **What You Know Best** – If you are shaky on some of the concepts covered in the Real Estate Modeling course, for example, don't list it on your resume.
- **What is Most Relevant to the Job You Are Applying for** – If you're applying to consumer/retail investment banking groups, the Bank Modeling course will not be helpful. You should write about a consumer/retail case study in another course instead.

You will not get much benefit from writing about 5-6 different courses; focus on the most relevant one.

Also, do **not** prioritize these courses over real work experience. The courses show that you've gained transferable skills and that you've taken the initiative to learn on your own, but you should *not* devote half your resume to them.

You should prioritize the *financial modeling courses* over the Excel and PowerPoint courses. While the skills you gain in those courses are useful, it's harder to discuss them in interviews.



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You should **not** list the Interview Guide or Networking Toolkit on your resume for obvious reasons.

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Step 2: Short Descriptions vs. Long Descriptions

You can write about a course by turning it into a “Work & Leadership Experience” entry, or by including it at the bottom of your resume/CV in the section on Skills, Activities, & Interests.

Example of a “Long Description” in the Work & Leadership Experience Section:

Core Financial Modeling (BIWS)

[Completion Date]

Online Financial Modeling Training Program

- Completed 30+ hours of modeling tutorials based on case studies of companies and deals in North America, Europe, Asia, and Australia
- Created 3-statement projections to analyze potential minority-stake investment in Coles (Australia); concluded that 15%+ IRR was plausible due to company’s improving Return on Capital and 4-5% Dividend Yield
- Built DCF analysis for Steel Dynamics starting from blank sheet in Excel; concluded that company was overvalued by 5-15%
- Completed case study based on Apollo’s \$2.1 billion USD leveraged buyout of the Great Canadian Gaming Corporation; built LBO model with revenue/expense/cash flow projections and recommended investing based on likelihood of achieving 20% IRR
- Awarded Financial Modeling Certification by passing evaluation quiz with score above 90% (<https://breakingintowallstreet.com/certificates/>)

The Core Financial Modeling course includes MANY case studies, so pick the ones you are most familiar with. DO NOT LIST EVERYTHING.

We provide example language for the other case studies below.

Example of a “Short Description” at the Bottom of Your Resume:



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You can also add the course to your resume by creating a line for "Training" or "Certifications" in the bottom section of your resume, as shown below:

- **Languages:** Fluent in Mandarin; working knowledge of Korean and Japanese
- **Technical Skills:** Familiar with C/C++ programming
- **Certifications:** Core Financial Modeling (BIWS) training program; created 3-statement operating model for Coles, valuation for Steel Dynamics, and LBO model for Apollo's buyout of the Great Canadian Gaming Corporation
- **Activities:** Founder of Investment Club; Captain of Triathlon Team
- **Interests:** Scuba diving, off-road racing, skydiving, and hang gliding

You could list the course under "Education" as well, but this is more useful if you're using it to "offset" a lesser-known school or a lower GPA.

Should You Use a Long Description or Short Description for the Course(s)?

- **Use a Long Description If:** You are a university or Master's student without relevant internships, or you are a career changer at the MBA-level or beyond.
- **Use a Short Description If:** You are a student or professional with previous, relevant finance experience.

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Step 3: Selecting the Appropriate Template(s)

We'll list the long and short-form descriptions for each course below:

Excel & VBA – Template

Here's the long-form template first:

Excel & VBA (BIWS)

[Completion Date]

Online Financial Modeling Training Program

- Completed case studies based on Walmart operating model and valuation and customer order/sales rep due diligence data
- Learned key Excel shortcuts and features for navigation, formatting, formulas, and graphs; fixed errors in case files and added features such as sensitivity tables and dynamic charts



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- Mastered lookup functions, such as XLOOKUP, INDEX, MATCH, and INDIRECT, and created “football field” valuation graphs, price-volume charts, and waterfall charts
- Completed VBA lessons and learned how to record and edit macros to speed up formatting and error-checking within Excel
- Awarded Excel Certification by passing evaluation quiz with score above 90% (<https://breakingintowallstreet.com/certificates/>)

And here’s the short-form template:

- **Certifications:** Excel & VBA (BIWS) online training program; completed Walmart and customer due diligence case studies, and learned navigation, formatting, formulas, graphs, and VBA fundamentals

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Core Financial Modeling – Template

We already gave examples of the long-form template for 3 case studies in this course above, so here’s the suggested long-form language for the **other** case studies:

Core Financial Modeling (BIWS)

[Completion Date]

Online Financial Modeling Training Program

- Completed Stadler Rail (Switzerland) 3-statement modeling case study; determined that company could use 100% Debt funding while complying with its maximum Leverage Ratio and Debt / Total Capital
- Calculated metrics and multiples such as Enterprise Value, TEV / EBIT, TEV / EBITDA for companies under U.S. GAAP (Target and Zendesk) and IFRS (Vivendi)
- Built accretion / dilution analysis for Builders FirstSource’s \$2.5 billion acquisition of BMC Stock Holdings; concluded that offer price was reasonable, but that deal should be funded with a mix of Cash, Debt, and Stock rather than 100% Stock
- Completed LBO model for Bain Capital’s \$1 billion USD leveraged buyout of NichiiGakkan (Japan); recommended deal due to high chance of 30%+ IRR even in downside cases due to acquisition at historically low EBITDA multiple



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- Analyzed Netflix's plans to use 100% debt to fund its operations and recommended a 50% Equity / 50% Debt mix in downside cases based on required Interest Coverage, Leverage, and Debt Service Coverage Ratios
- Awarded Financial Modeling Certification by passing evaluation quiz with score above 90% (<https://breakingintowallstreet.com/certificates/>)

Pick the 2-3 case studies or topics you know best, tweak the language above, and make sure you know the models inside and out for discussion in interviews.

Here's the short-form template using a few of the case studies above:

- **Certifications:** Core Financial Modeling (BIWS) training program; created 3-statement model for Stadler Rail, merger model for Builders FirstSource / BMC Stock Holdings, and LBO model for Bain's buyout of NichiiGakkan

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Advanced Financial Modeling – Template

We'll start with the long-form template:

Advanced Financial Modeling (BIWS)

[Completion Date]

Online Financial Modeling Training Program

- Complete [**XX**] hours of training based on complex 3-statement models, valuations, merger models, and LBO models
- Built 3-statement projection model for EasyJet (U.K.) based on airline's key drivers for revenue, expenses, and cash flows; concluded that company could not use 100% Debt as initially planned and would have to use 25% Debt / 75% Equity in extreme downside case
- Valued Jazz Pharmaceuticals (U.S.) based on drug-by-drug financial projections and Public Comps, Precedent Transactions, and 10-year DCF analysis; concluded that company was undervalued by 30-70% and made "Long" recommendation
- Built quarterly merger model for Builders FirstSource's \$2.5 billion acquisition of BMC Stock Holdings; recommended a mixed Cash/Debt/Stock deal structured as a Stock Purchase



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- Analyzed SunPower's \$1 billion spin-off of Maxeon, built Sum of the Parts valuation, and concluded that while Maxeon would need additional post-transaction funding, deal could double or triple SunPower's share price if executed successfully
- Built merger model for Fortum's acquisition of 71% stake in Uniper, with support for variable stub period and variable ownership percentages; found that later close date and 80-85% ownership would maximize EPS accretion
- Built LBO model for KKR's £4.2 billion buyout of Viridor with features such as stub periods and a leveraged dividend recap; recommended against deal for sponsor but supported it for lenders due to low downside risk
- Completed open-ended LBO case study based on \$1.7 billion leveraged buyout of Cars.com; recommended investment based on turnaround strategy and add-on acquisitions that could potentially double company's EBITDA over 5-year period, resulting in IRRs of 20-30%
- Analyzed Netflix's options for refinancing \$4 billion in upcoming debt maturities and suggested refinancing upon maturity rather than raising funds to lock in lower rates; completed credit analysis for senior unsecured notes and potential convertible bond
- Awarded Financial Modeling Certification by passing evaluation quiz with score above 90% (<https://breakingintowallstreet.com/certificates/>)

Pick the 2-3 case studies or topics you know best, tweak the language above, and make sure you know the models inside and out for discussion in interviews.

Here's the short-form template using a few case studies above:

- **Certifications:** Advanced Financial Modeling (BIWS) training program; created 3-statement model for EasyJet, valuation/DCF for Jazz Pharmaceuticals, and LBO model for Cars.com

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PowerPoint Pro – Template

Here's the long-form template first:

PowerPoint Pro (BIWS)

Online Financial Modeling Training Program

[Completion Date]



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- Completed PowerPoint training based on sell-side M&A and valuation pitch book for Jazz Pharmaceuticals and learned key shortcuts for inserting, manipulating, and formatting shapes, slides, text, Excel objects, graphs, and tables
- Created company and deal profiles in different formats and completed introductory VBA training for set of 25+ macros included in training package
- Practiced key commands and shortcuts via exercises for creating and fixing slides such as “football field” valuation graphs, process and timeline diagrams, company profiles, and corporate/legal structure charts

And here’s the short-form template:

- **Training:** Completed PowerPoint Pro (BIWS) online training program, based on sell-side M&A and valuation pitch book for Jazz Pharmaceuticals; mastered key PowerPoint shortcuts and commands and gained introductory knowledge of VBA and macros

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Project Finance & Infrastructure Modeling – Template

We recommend writing about the longer case studies in this course on your resume/CV, but we’ll also list a few short-form examples below:

Project Finance & Infrastructure Modeling (BIWS)

[Completion Date]

Online Financial Modeling Training Program

- Completed 15 hours of training based on models for toll roads, airports, solar plants, natural gas plants, offshore wind developments, and nuclear plants
- Built cash-flow model for toll road in Spain (Autopista AP-41) and recommended against acquisition for 15x EBITDA due to inability to earn targeted 10% IRR over 20 years
- Modeled 20 MW solar development in North Carolina (~\$30 million) and recommended investing due to likelihood of achieving 12% IRR even in downside scenarios with cost overruns, falling margins, and rising interest rates
- Analyzed 500 MW natural gas plant acquisition (~\$550 million), built cash-flow model, and recommended against deal due to high asking price (10%+ overvalued)



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- Created quarterly offshore wind development model for Moray East Wind Farm (U.K.) (760 MW); built 6 scenarios, sized and sculpted two Debt tranches based on LLCR targets, and recommended against investing due to risk of cost overruns and lower-than-expected net energy yields from turbines
- Built quarterly model for North Collinsville solar plant in Australia (130 MW – \$263 million AUD), including support for upfront vs. pro-rata equity, DSRA and MMRA accounts, cash trap, LCOE, and LLCR-based debt sizing/sculpting; recommended investing due to likelihood of achieving 15% pre-tax equity IRR
- Analyzed \$18 billion USD acquisition of Singapore Changi International Airport, including new Terminal 5 construction, with support for scenarios, NOLs, construction loans, variable cash flow sweeps, and DSCR-restricted dividends; recommended against investing due to low likelihood of achieving 15% IRR in Base Case and overly aggressive leverage (8x EBITDA)
- Completed 80-year development/operational model for Shin Hanul Units 3 & 4 nuclear power plant in South Korea (2.68 GW – \$8.8 billion USD), including support for multiple development phases, debt/equity/preferred stock, mixed market-rate and PPA revenue, and VBA; recommended PPA rates that would produce 5 – 15% equity IRRs across cases

Venture Capital & Growth Equity Modeling – Template

Here's the long-form template first:

Venture Capital & Growth Equity Modeling (BIWS)

[Completion Date]

Online Financial Modeling Training Program

- Completed 20 hours of VC and growth equity training based on cap table, 3-statement modeling, valuation, and exit modeling case studies
- Built cap tables across funding rounds for MuscleFrost (direct-to-consumer company) and recommended \$5 million Series A investment at \$15 million pre-money valuation and 1x liquidation preference based on valuation, potential exit values, and dilution analysis
- Analyzed market and revenue potential for Antios (Series C biotech) and recommended against investment in \$250 million round at \$800 million pre-money valuation due to concerns around price, success probability, and market size
- Recommended investing in €110 million growth equity round for Procyon (enterprise SaaS) due to favorable unit economics, strong growth, and likely 3x multiple and 30% IRR



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- Built quarterly financial model and valuation for Sapphire Wolf (private SaaS startup); applied private company adjustments and recommended raising funds at pre-money valuation of \$30 – \$35 million based on DCF scenarios and high Founder dependency
- Created merger model with earnout, cap table, flow of funds analysis, and IPO vs. SPAC comparison for CyberFence (growth-stage tech startup); recommended IPO as best exit option
- Completed advanced cap table case study with unpriced convertible seed round, venture debt, and priced rounds with liquidation preferences, participating preferred, anti-dilution provisions, option pools, and flow of funds analysis with circular references
- Built Sum-of-the-Parts (SOTP) biotech valuation for Ventyx (inflammatory diseases); recommended against investing in \$500 million follow-on offering due to 30 – 40% overvaluation and insufficient offering price discount

And here's the short-form template:

- **Training:** Completed Venture Capital & Growth Equity (BIWS) online training program; built granular SaaS models, cap tables, flow of funds analysis, and early-stage biotech valuations

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Bank & Financial Institution Modeling – Template

Here's the long-form template first:

Bank & Financial Institution Modeling (BIWS)

[Completion Date]

Online Financial Modeling Training Program

- Completed FIG modeling and valuation training based on case studies of Shawbrook, KeyBank's \$4.1 billion acquisition of First Niagara, ANZ, and Philippine Bank of Communications; also completed insurance modeling lessons
- Built 3-statement operating model for Shawbrook based on loan market share and GDP growth, net charge-offs and provisions, and spreads on interest-earning assets and interest-bearing liabilities; projected financial statements and calculated CET 1 Ratio, Net Stable Funding Ratio, and Liquidity Coverage Ratio



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- Valued Shawbrook using dividend discount model, residual income (excess returns) model, regression analysis, and public comps and precedent transactions with P / E and P / TBV multiples; concluded that company was 30-50% overvalued and made “Short” recommendation in detailed stock pitch
- Built complex merger model for KeyBank and First Niagara, including support for mark-to-market adjustments, deposit divestitures, core deposit intangibles, the write-down of the Allowance for Loan Losses, and synergies; valued synergies, calculated accretion/dilution and IRR, and recommended against the deal due to marginal benefits from the seller
- Created bank growth equity model for ANZ to analyze follow-on offering that would boost the bank's Net Stable Funding Ratio under APRA rules; calculated returns to equity investors and recommended investment due to achievement of the targeted returns across cases and minimal downside risk
- Built bank buyout model for Philippine Bank of Communications to assess a 100% control transaction for the company combined with a Nonperforming Loan (NPL) Divestiture; calculated returns to equity investors and recommended against deal due to lower-than-targeted returns in Base and Upside cases
- Built P&C insurance operating model based on GWP growth, premium rates, reinsurance, ceded premiums, loss & LAE ratio, and commissions; also learned P&C insurance valuation and Embedded Value for life insurance
- Awarded Bank Modeling Certification by passing evaluation quiz with score above 90% (<https://breakingintowallstreet.com/certificates/>)

This entry is too long to list on your resume, so pick the 2-3 bullets you're most comfortable with and write about those.

Here's the short-form template:

- **Certifications:** Bank & Financial Institution Modeling (BIWS) online training program; completed stock pitch and valuation case study based on Shawbrook and M&A case study based on KeyBank's \$4.1 billion acquisition of First Niagara; built 3-statement model, valuation, and merger model

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Real Estate Modeling (Properties) – Template



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Like the Core Financial Modeling course, the Real Estate course has *many* case studies, so you need to be selective about the ones you list.

We recommend picking the **1 or 2 case studies you know best** and making sure you can discuss them extensively in interviews. Here's the long-form template first:

Real Estate Modeling (BIWS)

[Completion Date]

Online Financial Modeling Training Program

- Built monthly model for office development in London (100 Bishopsgate) and evaluated equity vs. mezzanine investments; found that mezzanine investors were more likely to succeed in deal due to performance in downside case
- Evaluated hotel acquisition/renovation in Dubai (Jumeirah Beach Hotel), and recommended deal because IRRs above targeted levels were likely in all cases; also recommended that hotel continue to operate independently rather than join a franchise
- Analyzed stabilized multi-family property in Seattle (The Lyric) and built pro-forma model and returns analysis based on different scenarios; recommended against \$120 million acquisition due to inability to achieve targeted 10% IRR
- Built tenant-by-tenant rent roll and monthly pro-forma for 45 Milk Street (Boston), value-added office complex with 26% vacancy rate; recommended \$18 million acquisition due to favorable returns and limited downside risk
- Created pre-sold condominium development model for V:House (São Paulo), including support for 3-tier waterfall and multiple construction phases; recommended against R\$ 35 million investment due to unacceptable downside risk
- Awarded Real Estate Modeling Certification by passing evaluation quiz with score above 90% (<https://breakingintowallstreet.com/certificates/>)

And here's the short-form template:

- **Certifications:** Real Estate Modeling (BIWS) online training program; completed case studies for office development, hotel acquisition/renovation, stabilized multifamily acquisition, value-added office deal, and opportunistic pre-sold condo development

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REIT Financial Modeling – Template

This course is also quite detailed, but there are fewer case studies to pick from:

REIT Financial Modeling (BIWS)

[Completion Date]

Online Financial Modeling Training Program

- Created 3-statement projection model over 5 years for AvalonBay [AVB], leading residential REIT; based model on segment-by-segment buildup for same-store, development/redevelopment, acquisitions, and dispositions
- Valued AvalonBay using public comps and precedent transactions and metrics and multiples such as FFO and AFFO; also built Net Asset Value (NAV) Model, Levered DCF, Dividend Discount Model, and Replacement Value Model
- Assessed debt vs. equity issuance to fund property acquisition for SPH REIT; recommended 60/40 Equity/Debt deal because it would allow company to achieve its Interest Coverage, Gearing, and DPU Accretion targets in all scenarios
- Built merger model for \$5.8 billion Digital Realty / DuPont Fabros M&A deal; combined quarterly financial statements, calculated FFO and AFFO accretion/dilution, built Contribution and Value Creation analyses, and recommended deal
- Completed leveraged buyout model for Blackstone's \$3.2 billion buyout of Pure Industrial Real Estate Trust (PIRET); recommended against deal due to high purchase price, all-time low Cap Rates, and low add-on acquisition yields
- Awarded REIT Modeling Certification by passing evaluation quiz with score above 90% (<https://breakingintowallstreet.com/certificates/>)

And here's the short-form template:

- **Certifications:** REIT Financial Modeling (BIWS) online training program; built operating model and valuation for Avalon Bay, debt vs. equity model for SPH REIT, and REIT M&A model for Digital Realty / DuPont Fabros

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Step 4: How to Modify the Template(s) as Appropriate

You could take the templates above and copy and paste them as-is on your resume or CV.



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But if you do that, **your resume will be far too long**, and it will look the same as everyone else's. So, it's best to modify your entries as follows:

Example #1: Trim the Less Relevant Points

Let's say that you've completed the Bank & Financial Institution Modeling course. If you list the entire entry suggested above, you might not have enough space, and you might get difficult technical questions that you're not prepared to answer.

Here's a slimmed-down version of this entry:

Bank & Financial Institution Modeling (BIWS)

[Completion Date]

Online Financial Modeling Training Program

- Built 3-statement operating model for Shawbrook based on loan market share and GDP growth, net charge-offs and provisions, and spreads on interest-earning assets and interest-bearing liabilities; projected financial statements and calculated CET 1 Ratio, Net Stable Funding Ratio, and Liquidity Coverage Ratio

Example #2: Create Your Own Bullet Points

Rather than copying the exact suggestions above, you can also **create your own bullets**:

Advanced Financial Modeling (BIWS)

[Completion Date]

Online Financial Modeling Training Program

- Completed financial modeling case study based on valuation of Jazz Pharmaceuticals (branded, orphan drug focus)
- Researched company's markets and pricing to create 10-year revenue forecasts for key drugs such as Xywav, Epidiolex, Zepzelca, and Sunosi; built different cases based on patent expirations, possible generic competitors, and expected market penetration
- Used valuation and DCF output to draft presentation recommending sell-side M&A process; rejected alternative strategies such as debt and equity issuances and add-on acquisitions

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Step 5: Any Questions?

If you still have questions, [please click here to contact us and submit a ticket to our help desk.](#)

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