



Financial Industry

Our students serve as valuable support staff in banks, investment firms, accounting departments, and other financial settings. They are trained in key professional skills and assist with the daily operations of various teams, all while developing their knowledge, experience, and interest in the financial industry.

Common Tasks and Responsibilities

1. Accounting

- Donor/donation processing
- Provide data around performance of individual portfolios
- Review and audit investments and transactions
- Verify report scheduling and deliver reports in a timely manner

2. Accounts Payable and Receivable

- Expense report processing, recording and reconciliation
- Invoice matching and data entry
- Returned check processing

3. Customer Support

- Assist with customer accounts
- Deactive old accounts and ensure all current accounts are active
- Prepare documents or emails for clients regarding their account status

4. Database Management

- Archiving documents or files within database

- Editing and updating documents within database
- Scanning, uploading and adding documents to database

5. Records Management

- Developing systems for further organization of digital and physical records
- Digitizing documents and records
- Review bank statements and credit reports for accuracy

6. Research

- Research relevant topics by department
- Synthesize and articulate relevant research in a document

7. Tax Reporting

- Assisting in tax audit reporting
- Assisting in tax return and filing
- Creating and maintaining tax reports and spreadsheets
- Preparing tax depreciation files
- Updating tax management portfolios

Have another area that could benefit from project-based or day-to-day support?
Let's talk about how Cristo Rey Orlando students can help!

"The students help us out tremendously. They're quite impressive and bring ideas to the table that provide a whole new perspective that we can't get anywhere else. That's invaluable because soon, they and their generation will be our members."

— Jorge Hurtado, Director of Consumer Lending Operations, BCU



Interested in becoming a Corporate Partner and learning more? Join us in shaping the future.

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