

Wall Street Playbook.

FREE FIELDNOTES / APPLICATIONS

10 finance resume bullet rewrites

A useful bullet tells the reader what you did, what you worked on and why that work mattered. These ten fictional examples show how to make that evidence visible without upgrading your responsibility or inventing a result.

THE TASK

Leave with three bullets you can explain and substantiate in an interview.

Students and career changers | Suggested session: 25 minutes

Updated 2 October 2026. Original exercises with stated assumptions and source notes.

How to use this resource

Work through the prompts before checking the answers. Keep a record of the assumption or step that caused difficulty, then repeat that part without notes. The suggested timing is a study aid, not an employer assessment standard.

Start with the evidence, then write

Write three notes before drafting: the deliverable you produced, the scope you can verify and the decision or process it supported. A count can establish scope even when there is no measured commercial outcome.

The rewritten bullets below are fictional teaching examples, not customer results. Use their structure only. Replace every figure, tool and claim with your own evidence; delete anything you cannot defend.

Evidence	Useful question	Record
Ownership	What did I personally build, check or deliver?	Your actual contribution
Scope	How many records, periods, businesses or outputs?	A verifiable count or range
Use	Who used it, and for what?	An observed use, not an assumed impact

01-02 / Student experience

Investment club research

BEFORE

Helped with valuation and presented stocks.

REWRITTEN

Built a three-year revenue forecast and trading-comparables table for a student consumer-company pitch; presented the valuation range and two demand risks to the club committee.

The deliverables establish technical scope. This does not claim the club invested, beat the market or used a professional-grade model.

Course project

BEFORE

Completed a financial modeling project in class.

REWRITTEN

Reconciled a public company's cash-flow statement to its balance-sheet cash change for a course project; documented three classification differences in a one-page review note.

Keep the course context. Calling it investment research for a client would change the underlying facts.

03-04 / Internship contributions

Banking internship

BEFORE

Worked on a live M&A deal.

REWRITTEN

Updated the buyer-research table for a sell-side process, checked 28 company profiles against public sources and flagged six missing acquisition-history entries for the analyst.

Specify the part you owned. Do not say you led the transaction or disclose confidential client information.

Wealth-management internship

BEFORE

Managed portfolios and helped clients.

REWRITTEN

Prepared allocation summaries for 12 advisor review meetings by reconciling custodian holdings to the team's reporting template.

Preparing a report is different from making investment decisions. Use a count only if you can verify it and are permitted to share it.

05-06 / Work outside front-office finance

Audit associate

BEFORE

Did audits and tested financial statements.

REWRITTEN

Tested revenue cut-off across 40 selected invoices, documented exceptions and prepared the supporting workpaper for senior review.

Avoid implying that identifying an exception established fraud, changed reported revenue or amounted to transaction diligence.

Operations analyst

BEFORE

Improved efficiency with Excel.

REWRITTEN

Built an Excel reconciliation that matched weekly shipment records to invoices and routed unmatched items to the operations lead.

This is useful without an invented percentage saving. Add time savings only when a before-and-after measurement exists.

07-08 / Corporate and commercial work

FP&A analyst

BEFORE

Helped prepare budgets and monthly reports.

REWRITTEN

Separated the monthly revenue variance into volume and price effects for three product lines, then summarized the largest driver for the finance manager's review.

Describe the analytical method and audience. Do not attach a company-wide profit improvement to a reporting task.

Commercial banking analyst

BEFORE

Analyzed borrower creditworthiness.

REWRITTEN

Spread three years of borrower financials, reconciled reported EBITDA to the lending team's definition and summarized working-capital movements in the renewal memo.

A credit recommendation is not an approval. Identify the decision-maker accurately.

09-10 / Career transitions

Engineering to finance

BEFORE

Used data to improve manufacturing performance.

REWRITTEN

Compared maintenance alternatives using equipment downtime, repair costs and replacement outlays; built the scenario table used in the plant manager's budget discussion.

Explain the financial reasoning that actually occurred. Do not rename engineering work as private equity experience.

Campus leadership

BEFORE

Led the finance society and organized events.

REWRITTEN

Coordinated four alumni discussions, tracked the event budget and collected attendee questions to prepare the moderators.

Leadership can be concrete without inflated membership growth or invented employer relationships.

Your three-bullet drafting worksheet

Choose one technical task, one collaboration example and one example of judgment. For each, complete the prompts below before compressing the story into a bullet.

- Task and context: what were you trying to produce?
- Your actions: what did you do yourself, and what did someone else do?
- Evidence: which file, record, count or observation supports the claim?
- Use: how did someone use the work? If unknown, end at the deliverable.
- Interview check: can you explain the inputs, one difficulty and one limitation?

Example 1: task / action / evidence / use

Example 2: task / action / evidence / use

Example 3: task / action / evidence / use

Edit for accuracy and readability

Next, review the full resume. Strong individual bullets will not fix an unclear target, missing dates or an unreadable layout. The full resume examples show how these choices fit together.

- Start with a precise verb. Prefer built, reconciled, compared or prepared when those describe the work.
- Use the employer's terminology where it fits your real experience; keep course and club work labeled.
- Remove confidential names, transaction details and customer data unless disclosure is permitted.
- Check dates, units and whether a figure describes your work or the whole team's work.
- Read the bullet aloud. A reader should understand the deliverable without decoding a string of finance terms.

Source notes and next steps

Harvard Mignone Center: creating a strong resume

Supports fact-based, specific resume writing. All ten examples and the worksheet are original fictional teaching material.

<https://careerservices.fas.harvard.edu/resources/create-a-strong-resume/>

Continue when you have identified a gap

Use a review for prioritized feedback on a draft, or a rewrite when the structure and wording need rebuilding. Compare scope, examples and current prices before choosing.

Compare resume review and rewrite

Read this resource online and find the current edition