

Wall Street Playbook.

FREE FIELDNOTES / NETWORKING

The finance networking email checklist

Good outreach gives someone a reason to understand your request and an easy way to respond. Use this checklist to review a genuine message to one person. It is an editorial guide, not a measured formula for reply rates.

THE TASK

Send a specific, accurate message and keep track of the conversation.

Students and career changers | Suggested session: 20 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.

The 11 checks before you send

Check	What to inspect
1. A relevant person	You can explain why their work or experience is relevant to your question.
2. An accurate introduction	Your school, role and connection are true. A professional personal email is fine.
3. A useful subject	Name the shared context or topic in a short, clear phrase.
4. A specific connection	Refer to a public talk, project, career path or genuine shared affiliation.
5. A focused purpose	Explain what you hope to learn; avoid asking someone to solve your entire job search.
6. A modest request	Ask whether they would be open to a brief conversation, with room to decline.
7. Easy scheduling	Offer flexibility and include your time zone when proposing times.
8. A readable message	Keep only the context needed to understand the request. There is no universal word-count cutoff.
9. Sensible attachments	Follow any instructions. Attach a clean PDF resume only when relevant; do not send a large unsolicited deck.
10. A final accuracy check	Check name, firm, links, spelling and any quoted detail against its source.
11. A respectful follow-up plan	Record the contact and date. Follow up once after a reasonable interval, then move on if there is no response.

A message you can annotate

The following is a fictional example. The detail about a public discussion should be replaced with something you actually read or attended.

- The introduction gives enough context to place the sender.
- The connection refers to a specific, public piece of work.
- The question is narrow enough for a useful conversation.
- The closing asks permission and does not presume a referral.

Subject: Question about your move from audit to banking

Hi Priya,

I'm a final-year accounting student at Northbridge University. I listened to your alumni discussion about moving from audit into industrials banking, and your point about learning how a transaction team uses diligence stood out.

I'm exploring a similar transition. Would you be open to a brief conversation about which skills were most useful in your first months? I'm happy to work around your schedule.

Thank you,
Alex

Follow up without creating pressure

A reasonable example is to wait roughly a week before one short follow-up. Adjust for holidays, stated availability and any instructions from the recipient. There is no reliable universal best send time, and silence does not prove the first message was read.

- Keep the original context available in the thread.
- Stop if they decline or ask not to be contacted.
- If they respond, prepare three questions you cannot answer from their public biography.
- After a conversation, send a short thank-you mentioning a specific useful point.
- Apply through the employer's required application process; networking does not replace it.

Example follow-up

Hi Priya, just following up on my note below about the audit-to-banking transition. If you have time for a brief conversation, I'd appreciate your perspective. I understand if your schedule does not allow it. Thank you, Alex.

A small contact log you will actually use

Track the next action, not just the number of messages sent. Avoid recording private details that are irrelevant to the professional conversation.

Person / context	Contact date	Response / next action
Example: Priya / alumni discussion	Day 1	No response; review once on Day 8
_____	_____	_____
_____	_____	_____
_____	_____	_____

My reason for contacting this person

One question I could ask in a conversation

The next action and date

Fix these three weak requests

Too broad

BEFORE

Can you help me break into finance?

REWRITTEN

Could I ask which parts of your credit-analysis work were most important when you moved into leveraged finance?

Make the request answerable. Use a question that fits the actual recipient.

Unsupported flattery

BEFORE

Your incredible career is a huge inspiration to me.

REWRITTEN

Your discussion of the transition from engineering to finance helped me identify the accounting gap in my preparation.

Only reference that discussion if it happened and you engaged with it.

Presuming an outcome

BEFORE

Please refer me for the analyst role and send this to the hiring manager.

REWRITTEN

I'm applying through the firm's analyst portal and would value your perspective on the role's day-to-day work.

A referral may emerge from a real relationship; it should not be presented as an obligation.

Source notes and next steps

Harvard Extension School: building your network

Background on informational conversations. Checklist, examples and suggested cadence are original editorial guidance.

<https://careerservices.fas.harvard.edu/resources/harvard-extension-school-guide-to-building-your-network/>

Continue when you have identified a gap

The full guide adds scenario-specific templates, conversation prompts and a broader outreach workflow.

[Preview the networking playbook](#)

[Read this resource online and find the current edition](#)