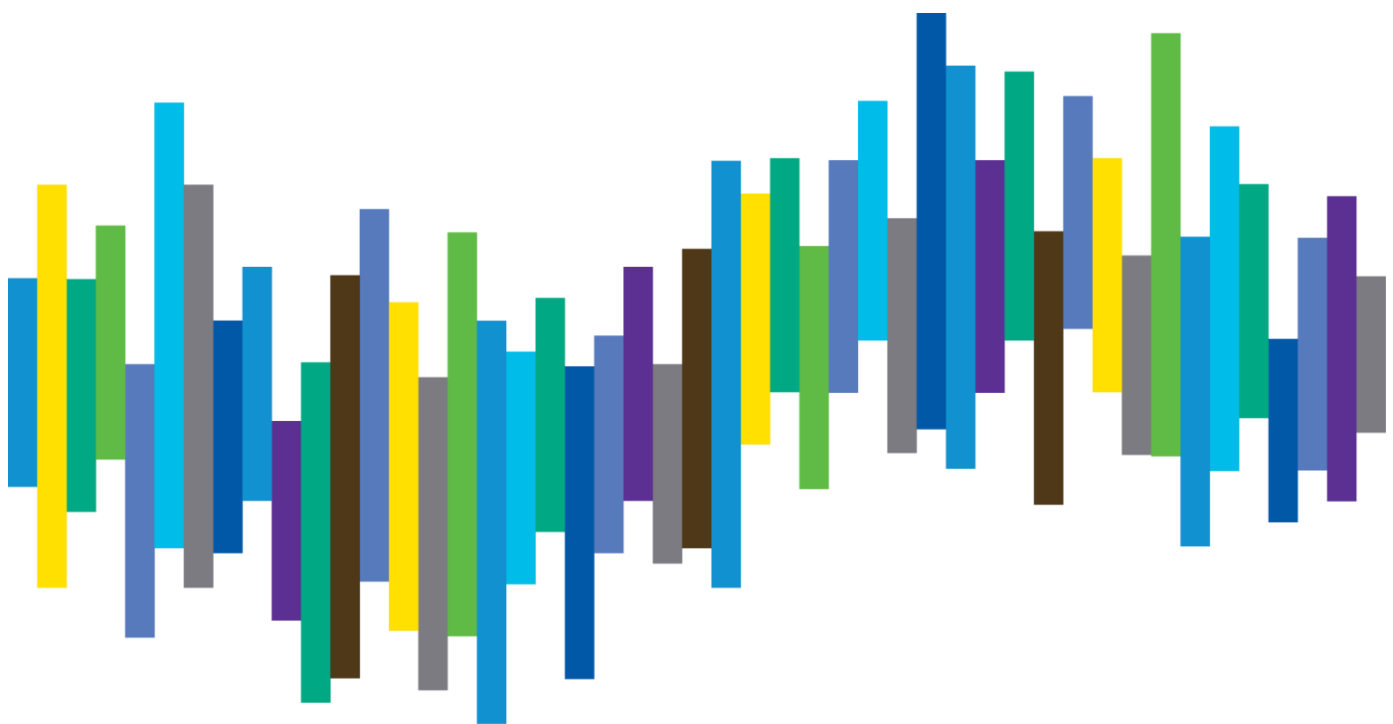


CAREER CENTER EMPLOYER USER MANUAL



CAREER CENTER EMPLOYER USER MANUAL

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Employer Support

If you have any questions, please contact Wiley for customer support by email at recruitmentsales@wiley.com or call the applicable regional team:

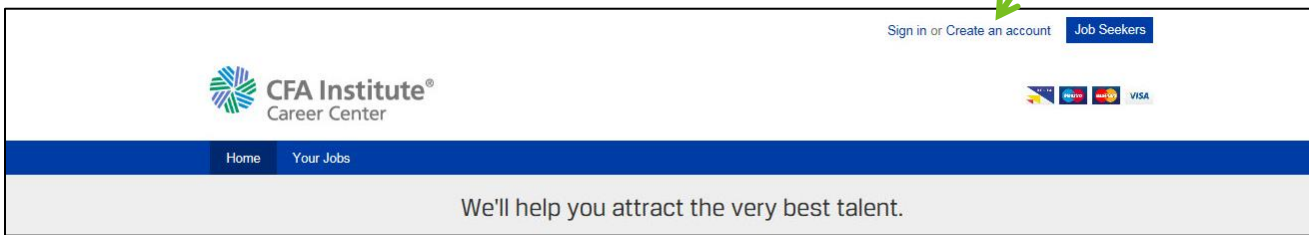
Americas: +1 (978) 609 4215

Europe, Middle East & Africa: +44 (0)1243 772041

Asia Pacific: +61 3 92743162

Create an Account

1. Access the Career Center at <https://employers.cfainstitute.org/>
2. Select the **Create an account** link.



3. Enter all required details as indicated by the red dots.

Your details

Title First name Last name

Email address Confirm email address

Password Confirm password

Company information

Please note: address and contact details provided here will be publicly visible to job candidates via your Employer Profile

Company name

Employer type

Please select...

Address line 1

Sign in if you already have an account.

Account benefits

- Post job advertisements
- Track and manage applications
- Find and download resumes
- Access your purchased resumes from any device

4. Review and agree to our Terms and conditions and Privacy policy by checking the box. Click the **Create an account** button.

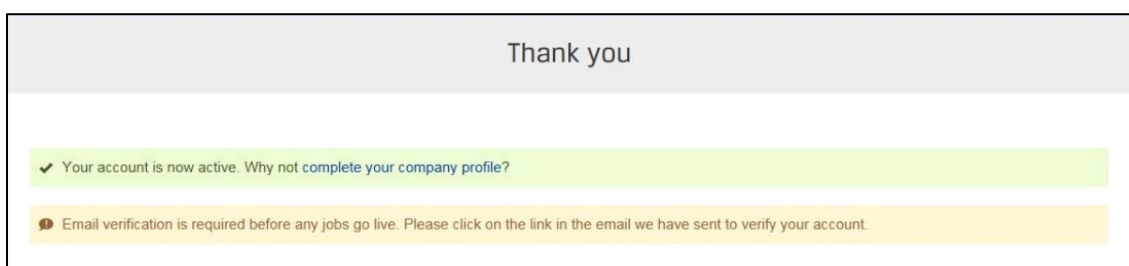
All emails will contain a link in the footer to enable you to unsubscribe at any time

agree to the Terms and conditions and Privacy policy.

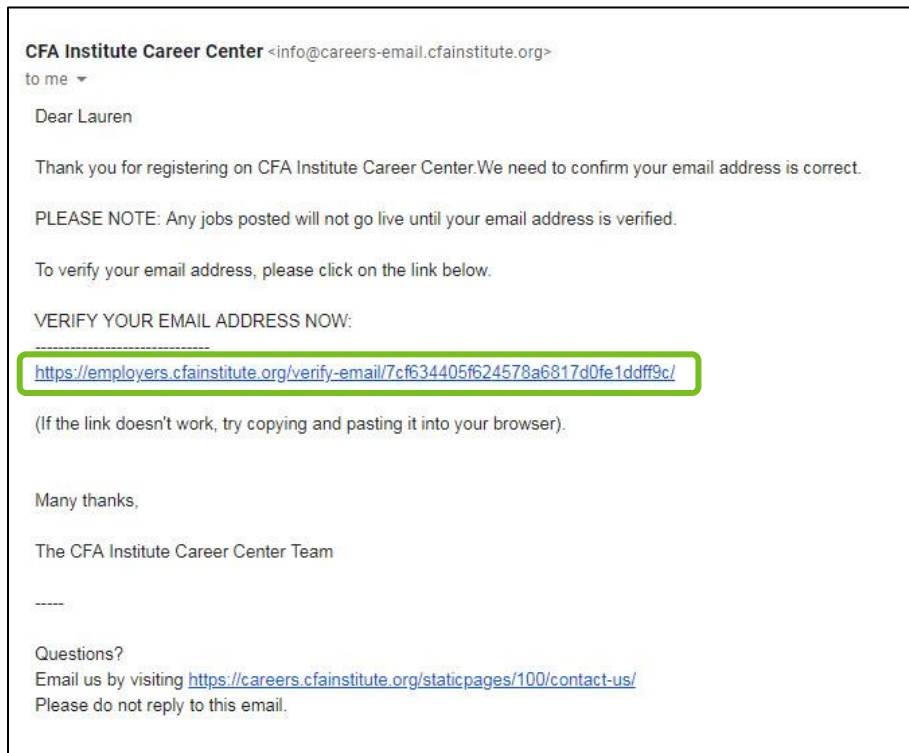
Create an account

5. As indicated on the Thank you page (A), you'll need to verify your email. Navigate to the inbox of the email you used to register to find the verification email. Click the link in the body of the email to verify your email address (B).
(Note: Check your spam or junk mailboxes if you do not see the email in your regular mailbox. The sender is **CFA Institute Career Center** <info@careers-email.cfainstitute.org>.)

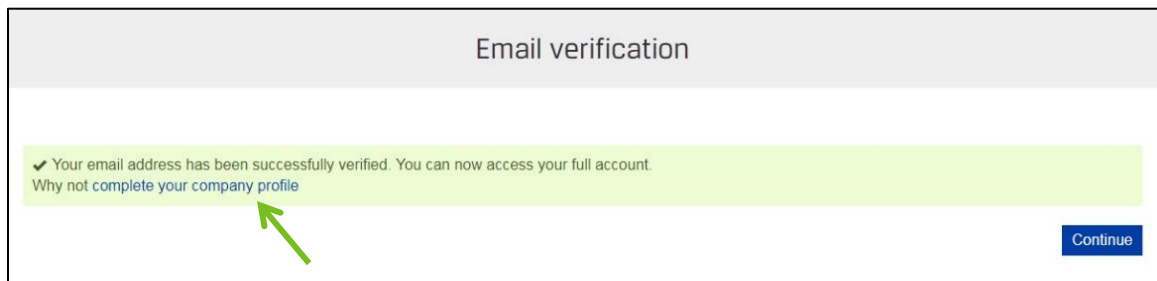
A.



B.

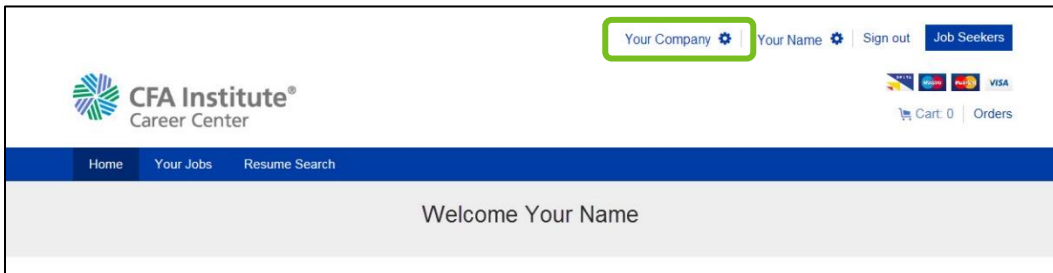


6. A browser will open to confirm your email has been verified. You will have the option to **complete your company profile** by clicking the link. (*Note: You can stop here and complete the profile later if desired.*)

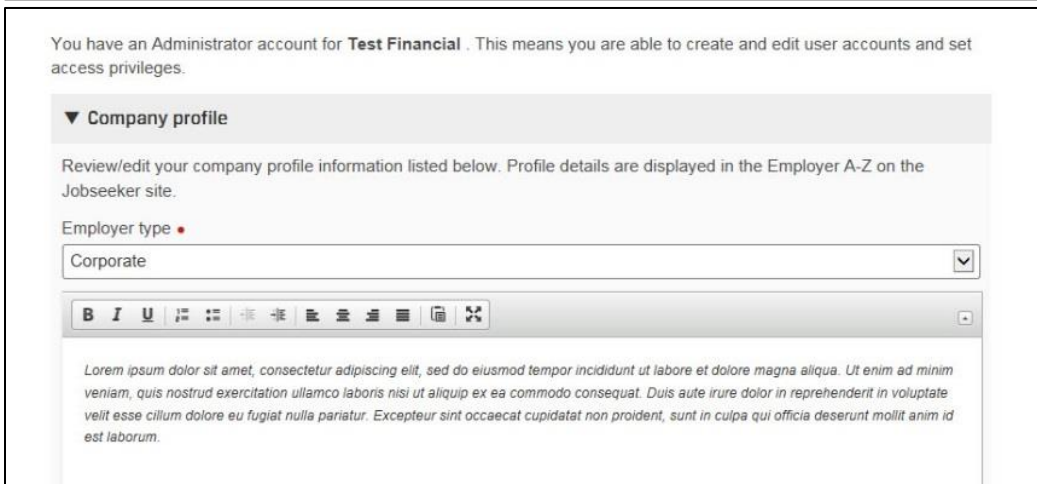


Create a Company Profile

1. If you are not creating your company profile immediately after you've created the account, navigate to the [Career Center](#) Home page to begin and sign in into you company account. Click your company name in the upper right corner to access your company profile.



2. Click the drop-down arrow to enter company information. (Note: Red dots indicate required fields.)

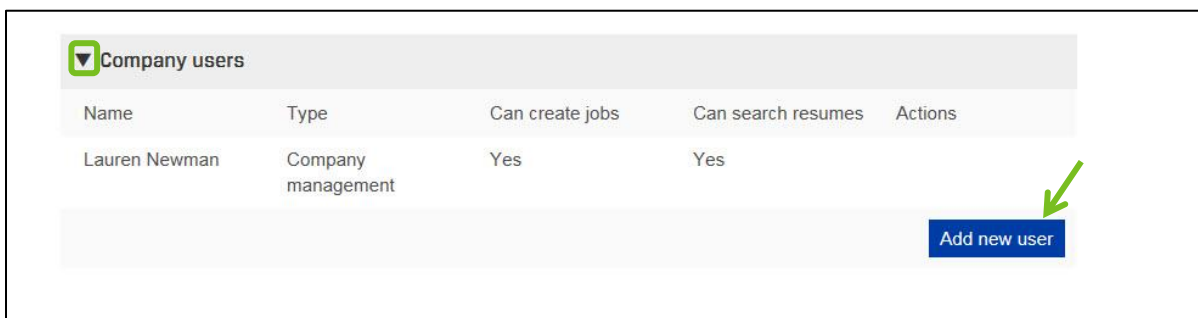


3. Click the **Save details** button when done.



Add User to Company Profile

1. Navigate to your company profile (See step 1 in [Create a Company Profile](#) section).
2. Select the drop-down arrow next to **Company users**. Click the **Add new user** button.



3. Enter user details and click **Save**. (*Note: You will need to check at least one of the boxes to denote the new user's level of access.*)

Access Options:

- Basic access: grants access to employer services site
- Job posting: enables the ability to post jobs on behalf of employer
- Resume searching: enables the ability to search resume database
- Company management: allows user to manage all company users and edit company profile

A screenshot of a web form titled 'Add a new user'. The form contains several input fields: Title (dropdown menu), First name (Jane), Last name (Doe), Email address (jane.doe@testfinancial.com), New user password, and Confirm new user password. Below these fields is a section for 'Access Options' with four checkboxes: Basic access (checked), Job posting, Resume searching, and Company management. The 'Basic access' checkbox is highlighted with a green box. A blue 'Save' button is located at the bottom right of the form, also highlighted with a green arrow.

Add a new user

Title: -
First name: Jane
Last name: Doe
Email address: jane.doe@testfinancial.com
New user password:
Confirm new user password:

Basic access
 Job posting
 Resume searching
 Company management





[Save](#)

Package Options and Features

Options

There are 4 packages to choose from when posting a job: standard, balanced, distributed, and diversified. Each contains different features for advertising your job post.

If you have internship opportunities, [click here](#) to post them at no cost.


Standard	Balanced	Distributed	Diversified
			
Launch your no-frills campaign for straightforward hires. Online listing with your logo	Highlight your ad to ensure it gets noticed. Online listing with your logo + Ad highlighted in search results + Access to candidates via email + Access to resume database	Feature your listing for greater visibility. Online listing with your logo + Ad highlighted in search results + Access to candidates via email + Access to resume database + Ad featured on homepage	Expand your reach and maximize application numbers. Online listing with your logo + Ad highlighted in search results + Access to candidates via email + Access to resume database + Ad featured on homepage + Your ad will display prominently at the top of your selected Job Function
\$395 / £315 / €370 30 days Select	\$545 / £435 / €510 30 days Select	\$745 / £595 / €695 30 days Select	\$1295 / £1035 / €1210 30 days Select
\$645 / £515 / €605 60 days Select	\$845 / £675 / €790 60 days Select	\$1195 / £955 / €1115 60 days Select	\$2095 / £1675 / €1955 60 days Select

If you are a firm that employs CFA charterholders, please [contact us](#) for a discount code towards any package purchase.

Features

- Online listing with your logo:** company logo will be displayed in job posting.

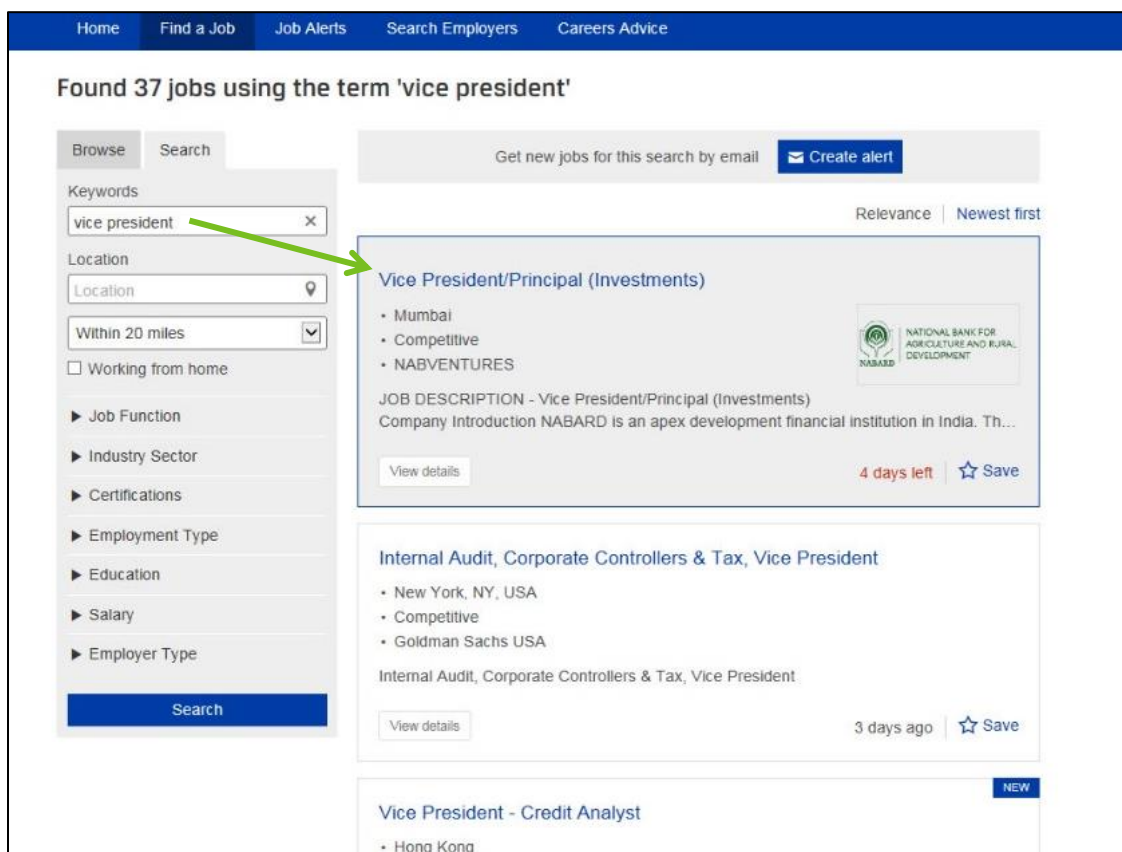
Northern Trust Asset Management - Quantitative Equity Research Analyst - Factor Investing (2-6 yrs)



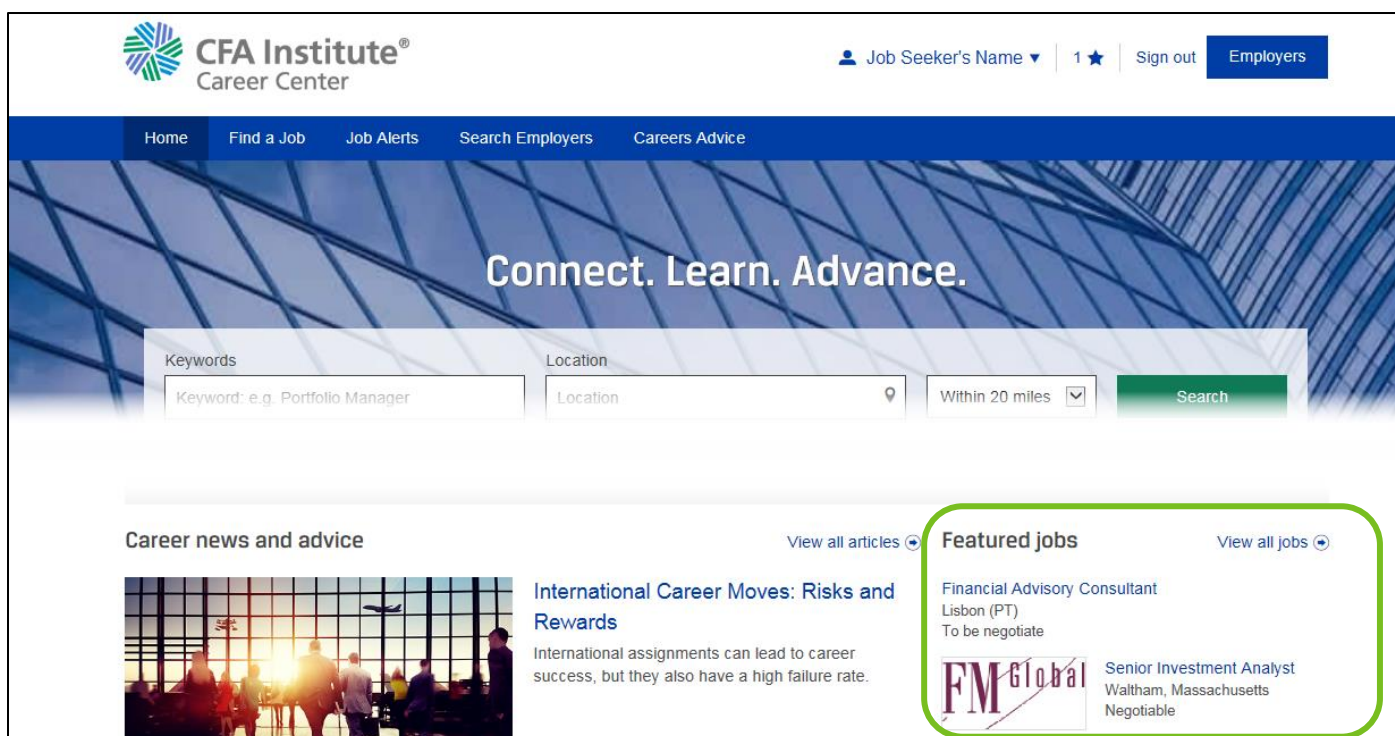
[Send](#) [Save](#) [Apply](#)

Employer	Northern Trust Asset Management	Quantitative Equity Research Analyst - Factor Investing (2-6 years)
Location	Bangalore City, Bangalore (IN)	Northern Trust Asset Management, Bangalore
Salary	Competitive	Mandatory Skills :
Posted	Feb 06, 2019	- 2 years min exp. in SAS or Python Or R or MATLAB
Closes	Mar 08, 2019	- 2-6 years of work experience and successful track record in quantitative analysis preferably in capital markets domain
Job Function	Equities Research: Buy Side	- Preference to top-tier engineering colleges (IITs / NITs)
Industry Sector	Asset Management	Key Responsibilities and Expectations :
Certifications	CFA Charterholder, Passed CFA Level I, Passed CFA Level II, Passed CFA Level III (Charter Pending)	1. Research factor based equity investment strategies, refine firm's existing factor solutions and assist in developing new quantitative investment strategies / products for buy-side clients
Employment Type	Full Time	2. Assist in managing the quantitative portfolio construction process and rebalancing of client accounts

2. **Ad highlighted in search results:** places job posting at the top of search results when job matches a job seeker's search parameters.



3. **Access to candidates via email:** ability to create email alerts that show candidates who meet alert criteria you define. Please see the [Create Saved Searches](#) section of this manual for more information on using this feature.
4. **Access to resume database:** grants access to resume database. Please see the [Search for Resumes](#) section of this manual for more information on using this feature.
5. **Ad featured on homepage:** promotes job posting on the Career Center Home page.



6. **Ad displayed prominently at the top of your selected Job Function:** places job posting at the top of search results when a job seeker browses by the same job function of the job posting.

Home Find a Job Job Alerts Search Employers Careers Advice

Portfolio Management: Equities jobs

Browse Search

Get new jobs for this search by email [Create alert](#)

Keywords
Keyword: e.g. Portfolio Manage [Search](#)

Refine your search

- Job Function
 - Portfolio Management: Equities
- Industry Sector
 - Asset Management 10
 - Asset Owner 2
 - Business or Knowledge Process Outsourcing (BPO / KPO) 1
 - Consulting Firm 2
 - Finance - General 27
 - Investment Bank 1
 - Non-Banking Financial Institution (Consumer finance, Leasing,

Found 42 jobs

TOP JOB

State Street - Portfolio Strategy Analyst - SSGA,

- Bangalore City, Bangalore (IN), Mumbai
- upto 20 LPA, Open for discussion
- State Street Services India Pvt Ltd

Job Description: The Portfolio Strategy Analyst is part of a team of investment professionals who have attained deep expertise in one or more asse...

[View details](#) 52 days ago [Save](#)

NEW

Director, Brokers and Exchanges Equity Analyst - Research

- Hong Kong
- Competitive
- HSBC

Director, Brokers and Exchanges Equity Analyst - Research


Post a Job

- From the Career Center Home page, select the region where the position is located. (*Note: You will need to be logged into your company account to post a job.*)

Access an exclusive network of **investment management professionals** composed of more than 250,000 members and program candidates globally and nearly 150 member societies locally.


Please select the region below where you want to post your job(s).

All postings will appear on the global CFA Institute Career Center site and on member society career sites where available.




Americas

[Click here for postings in Boston.](#)
[Click here for postings in San Francisco.](#)



Europe, Middle East, and Africa

[Click here for postings in Switzerland.](#)
[Click here for postings in the United Kingdom.](#)







Asia Pacific

[Click here for postings in India.](#)

- Select** a package that best meets your needs from the options provided.

If you have internship opportunities, [click here](#) to post them at no cost.

Standard	Balanced	Distributed	Diversified
 <p>Launch your no-frills campaign for straightforward hires.</p> <p>Online listing with your logo</p>	 <p>Highlight your ad to ensure it gets noticed.</p> <p>Online listing with your logo + Ad highlighted in search results + Access to candidates via email + Access to resume database</p>	 <p>Feature your listing for greater visibility.</p> <p>Online listing with your logo + Ad highlighted in search results + Access to candidates via email + Access to resume database + Ad featured on homepage</p>	 <p>Expand your reach and maximize application numbers.</p> <p>Online listing with your logo + Ad highlighted in search results + Access to candidates via email + Access to resume database + Ad featured on homepage + Your ad will display prominently at the top of your selected Job Function</p>
\$395 / £315 / €370 30 days <input type="button" value="Select"/>	\$545 / £435 / €510 30 days <input type="button" value="Select"/>	\$745 / £595 / €695 30 days <input type="button" value="Select"/>	\$1295 / £1035 / €1210 30 days <input type="button" value="Select"/>
\$645 / £515 / €605 60 days <input type="button" value="Select"/>	\$845 / £675 / €790 60 days <input type="button" value="Select"/>	\$1195 / £955 / €1115 60 days <input type="button" value="Select"/>	\$2095 / £1675 / €1955 60 days <input type="button" value="Select"/>

If you are a firm that employs CFA charterholders, please [contact us](#) for a discount code towards any package purchase.

3. Enter details for the position. (*Note: The red dot indicates required fields. **Job Function, Industry Sector, Certifications, and Employment Type** fields allow multiple selections. **Salary Description** is mandatory, but it is also a free text field. For example, you can type in “negotiable”, “market”, etc.)*)

Create a job ad for Test Financial

Did you know that previous jobs are available as templates? [Use a template](#)

Selected product: **Standard (30 Day)** [View all products](#)

Job title • 100 characters left

e.g. Portfolio Manager

Job reference 50 characters left

Publication date and duration •

Your job will be live from Jan 18, 2019 to Feb 17, 2019.

From To

Location •

This will not be shown in your job advertisement. Select up to 2 locations for your job.

Location description • 100 characters left

This will be shown in your job advertisement

Job Function •

- Accounting/Audit/Tax
- Actuarial Services
- Banking
- Brokerage
- C-Suite Level Management
- Commodities
- Compliance/Regulatory

LOCATION
The locations entered in this field will determine the society website(s) where the position will show. All jobs are shown on the global site.

LOCATION DESCRIPTION
This is the location where the position will be headquartered and will be shown in the job posting.

Add a location...

Location description • 100 characters left
This will be shown in your job advertisement

Job Function •

- Accounting/Audit/Tax
- Actuarial Services
- Banking
- Brokerage
- C-Suite Level Management
- Commodities
- Compliance/Regulatory

Industry Sector •

- Academic Institution, Test Prep
- Accounting/Audit Firm
- Asset Management
- Asset Owner
- Brokerage
- Business or Knowledge Process Outsourcing (BPO / KPO)
- Central Bank, Regulator

Certifications

- Passed CFA Level I
- Passed CFA Level II
- Passed CFA Level III (Charter Pending)
- CFA Charterholder
- Passed CIPM Principles
- Passed CIPM Expert
- CIPM Certificant

Employment Type •

- Full Time
- Consulting
- Part Time

INDUSTRY SECTOR LIST

- Academic Institution, Test Prep
- Accounting/Audit Firm
- Asset Management
- Asset Owner
- Brokerage
- Business or Knowledge Process Outsourcing (BPO/KPO)
- Centre of Excellence
- Central Bank, Regulator
- Commercial Bank, Credit Union, Private Bank, Savings & Loan,
- Consulting Firm
- Construction / Real Estate
- Credit Rating Agency/Bureau
- Government
- Fintech/Insurtech
- Information Technology, Software
- Insurance
- Investment Bank
- Manufacturing
- Non-Banking Financial Institution (Consumer finance, Leasing, factoring, etc.)
- Private Wealth Management Firm
- Securities Exchange
- Utilities (e.g., Oil & Gas, Energy)

JOB FUNCTIONS LIST

- Academics
- Accounting/Audit/Tax
- Actuarial Services
- Banking
- Brokerage
- C-Suite Level Management
- Commodities
- Compliance/Regulatory
- Corporate Finance
- Credit Analysis
- Economics
- Equities Research: Buy Side
- Equities Research: Sell Side
- ESG/Socially Responsible Research
- Fixed Income Research: Buy Side
- Fixed Income Research: Sell Side
- Foreign Currency
- Hedge Funds
- Institutional Sales
- Insurance
- Investment Advisor/Consultant
- Islamic Finance
- Management Consulting
- Multimanager Strategies
- Marketing and Public Relations
- Operations
- Performance Analysis
- Portfolio Management: Alternatives
- Portfolio Management: Equities
- Portfolio Management: Fixed Income
- Portfolio Management: Multi-Asset
- Private Equity/Venture Capital
- Relationship Management
- Risk Management
- Structured Products
- Trading
- Wealth Management
- Wholesale Sales
- Other

4. Click **Save and continue** when done.

The screenshot shows a text input field labeled "Alternate employer name" with a character count of "100 characters left". Below the input field is a blue button labeled "Save and continue". A green arrow points to the "Save and continue" button.

5. On the subsequent screen, you can pay and complete the job posting, **or** you can add additional details for the role. Click the **Go straight to cart** button to pay and post the position to the site. Alternatively, you can add more detail by selecting the **Supporting documents** tab (A) to upload additional documentation for the role, or the **Screening questions** tab (B) to add screening questions. You can also preview the job post by clicking the **Preview this job** button (C).

The screenshot shows a confirmation message: "✓ Your job advertisement has been saved". Below this is a light blue bar with the text "Add supporting documents and screening questions or" and a blue button "Go straight to cart". Below that is a tabbed interface with "Edit job" on the left and three tabs: "Supporting documents", "Screening questions", and "Upgrades". The "Supporting documents" tab is highlighted with a green box. At the bottom, a green bar contains a confirmation message "✓ Your job is now saved" and two buttons: "Preview this job" and "Continue editing". Green arrows point to the "Go straight to cart" button, the "Supporting documents" tab, and the "Preview this job" button.

A.

The screenshot shows the "Supporting documents" tab selected. It displays the text "This section is optional." and "Supporting documents will appear as download links in the job advertisement." There are two file upload sections: "Application form" and "Additional support document". Each section has a "Choose a file" button and a note: "(.doc, .pdf, .docx, .txt, .rtf with a file size of less than 1MB)". The "Supporting documents" tab is highlighted with a green box.

B.

The screenshot shows the 'Screening questions' tab selected in a job posting interface. At the top, there is a light blue header with the text 'Add supporting documents and screening questions or' and a blue button labeled 'Go straight to cart'. Below the header, there are four tabs: 'Edit job', 'Supporting documents', 'Screening questions' (highlighted with a green box), and 'Upgrades'. The main content area contains the following text: 'This section is optional.', '5 questions can be added to filter out unsuitable applicants.', and 'These questions will be added to the job application form. Any default questions are shown below but unique questions can also be added.' Below this text are three identical question input forms. Each form consists of a text input field labeled 'Question' and a dropdown menu labeled 'Expected answer' with the text 'Please select...' and a downward arrow.

C.

The screenshot shows the 'Test Position' page. On the left, there is a table of job details:

Employer	TEST Employer Account
Location	Charlottesville, Virginia
Salary	Market
Posted	Jan 11, 2019
Closes	Feb 10, 2019
Ref	Test reference code
Job Function	Academics
Industry Sector	Accounting/Audit Firm
Certifications	CIPM Certificatant
Employment Type	Full Time
Education	Doctorate

To the right of the table is a paragraph of placeholder text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.' Below the text is a section titled 'More searches like this' with a single search result: 'Academics Accounting/Audit Firm CIPM Certificatant Full Time jobs in Doctorate'.

6. In Shopping Cart, enter the relevant discount code, if applicable, in the field shown. Click **Apply code**. When finished, click the **Checkout** button to complete the order and post the job.

The screenshot shows the 'Your cart' page. At the top, there is a shopping cart icon and the text 'Your cart 1'. Below this, there is a table with one row representing a job listing:

YOUR JOB	Diversified (30 Day)	\$1,295.00	Remove
----------	----------------------	------------	--------

Below the table, there is a text input field labeled 'Discount code' and a button labeled 'Apply code'. The 'Discount code' field is highlighted with a green box. Below the input field, there is a 'Subtotal \$1,295.00' and a 'Total \$1,295.00' with a blue 'Checkout' button. A green arrow points to the 'Checkout' button.

7. You will receive confirmation by email that your order is complete. The job will be live on the Career Center within 15-20 minutes.

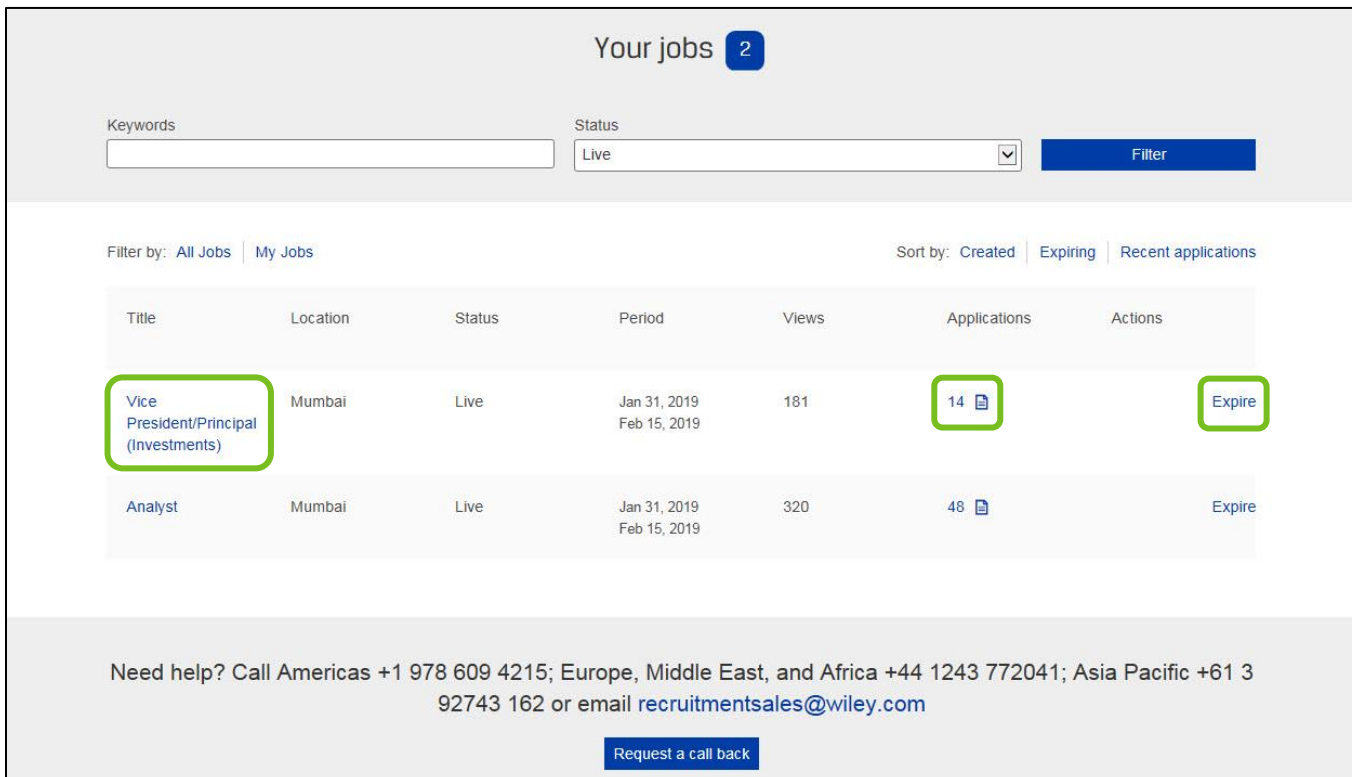
IMPORTANT: Job postings cannot be edited once posted. To request an edit to your live job posting, please [contact Wiley](#) directly.

Manage Job Postings

1. Posted jobs are managed in the Your Jobs section of the Career Center. Click **Your Jobs** in the top navigation bar.



2. On the Your jobs page, you can view your posting by clicking the job title, view total applications by clicking the number under the Applications column, or expire your post by selecting the **Expire** link.



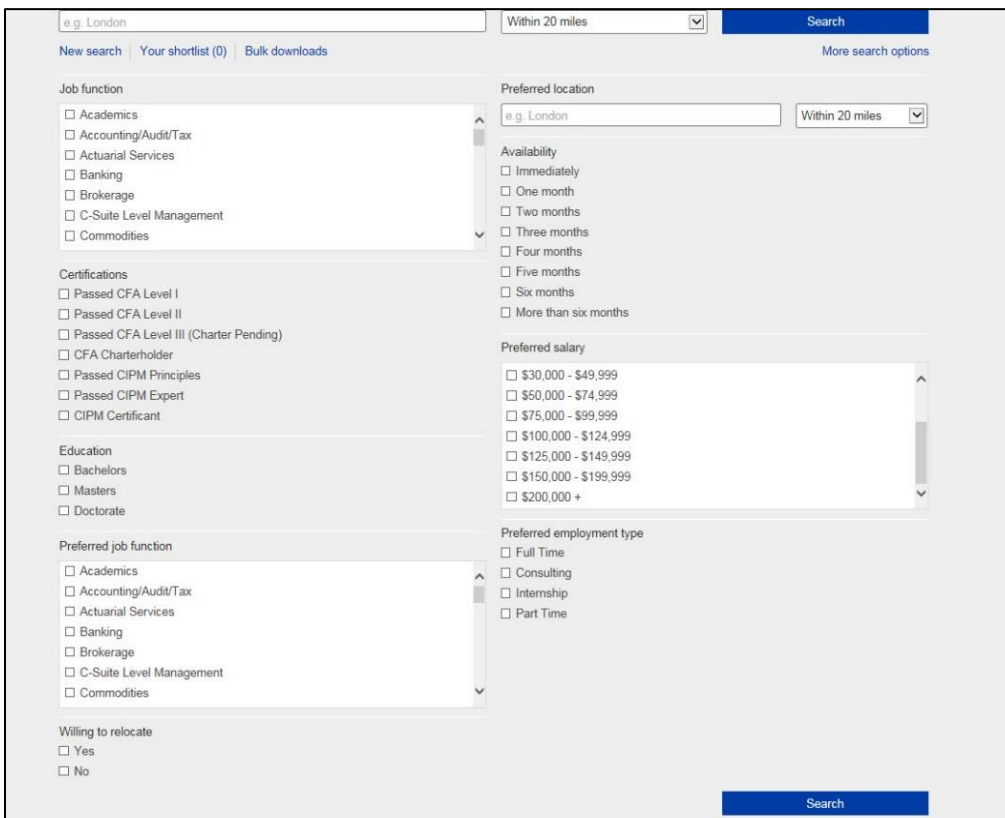
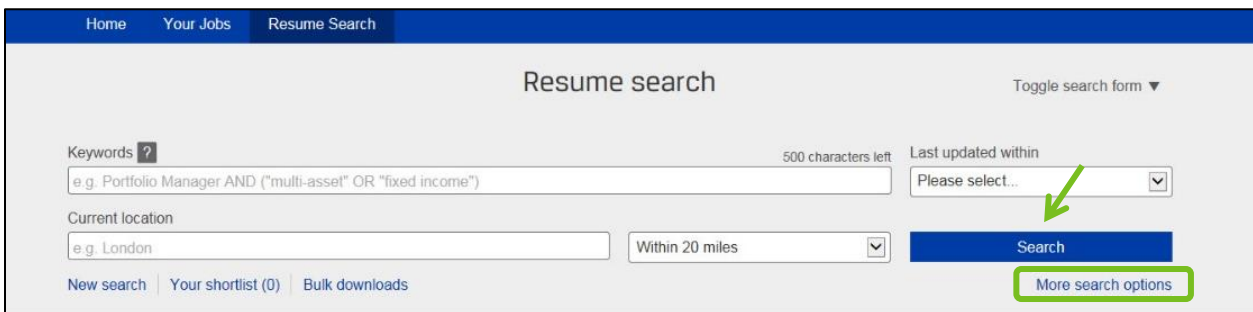
Search Resumes

Complete search functionality is available for users who purchase a Balanced package or higher. Please [contact Wiley](#) to turn on your access. If you purchased a Standard package, please [contact Wiley](#) to upgrade your access.

1. After logging into your account, click the **Resume Search** link in the top navigation bar on the Home page.



2. Enter search details and click the **Search** button. (*Note: Additional search options are available by clicking the **More search options** link.*)



3. Once your list populates, click the candidate's name to see full resume details. You can save a candidate to a shortlist by clicking the star icon. (*Note: The star will turn blue when saved.*) The shortlist can be accessed at any time through the Resume Search page **Your shortlist** link (A).

Resumes found 8,372

Resume alerts ▾ Saved searches ▾ Display: All matching resumes ▾

JOHN DOE NEW

Last updated Jan 18, 2019 | Last logged in Jan 18, 2019

An MBA Graduate with a concentration in Finance actively looking for opportunities in the Financial Services Industry.

Current job title	Preferred job function	Willing to relocate
Not Employed	Credit Analysis, Equities Research: Buy Side ...	Yes

☆

JANE DOE NEW

Viewed at 19:55 on 1/18/2019

Last updated Jan 18, 2019 | Last logged in Jan 18, 2019

Current job title	Preferred job function	Willing to relocate
Unspecified	Unspecified	Unspecified

☆

A.

Home Your Jobs Resume Search

Resume search

Toggle search form ▾

Keywords ? 500 characters left Last updated within

e.g. Portfolio Manager AND ("multi-asset" OR "fixed income") Please select... ▾

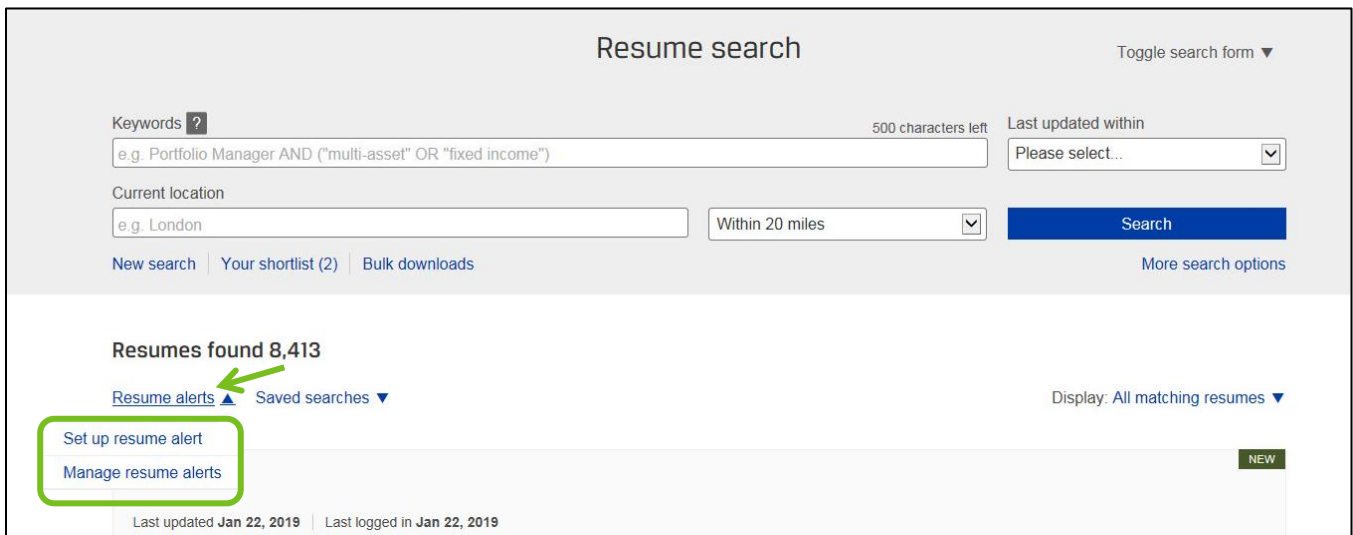
Current location

e.g. London Within 20 miles ▾ Search

New search **Your shortlist (2)** Bulk downloads More search options

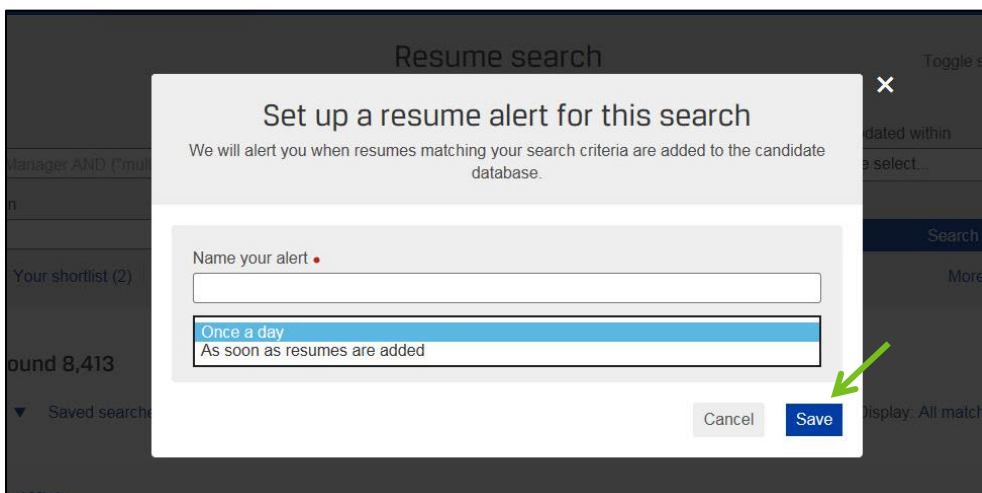
Create Resume Alerts

1. From the Resume Search page, create a resume alert by clicking the **Resume alerts** link then selecting **Set up a resume alert**. (*Note: You can access all setup alerts by clicking the **Manage resume alerts** dropdown option.*)



The screenshot shows the 'Resume search' interface. At the top, there are search filters for 'Keywords' (with a 500 character limit), 'Current location', and 'Last updated within'. Below these is a 'Search' button. The main content area shows 'Resumes found 8,413' and a dropdown menu for 'Resume alerts' which is highlighted with a green box and a green arrow. The dropdown menu contains two options: 'Set up resume alert' and 'Manage resume alerts'. A 'NEW' badge is visible on the right side of the dropdown menu.

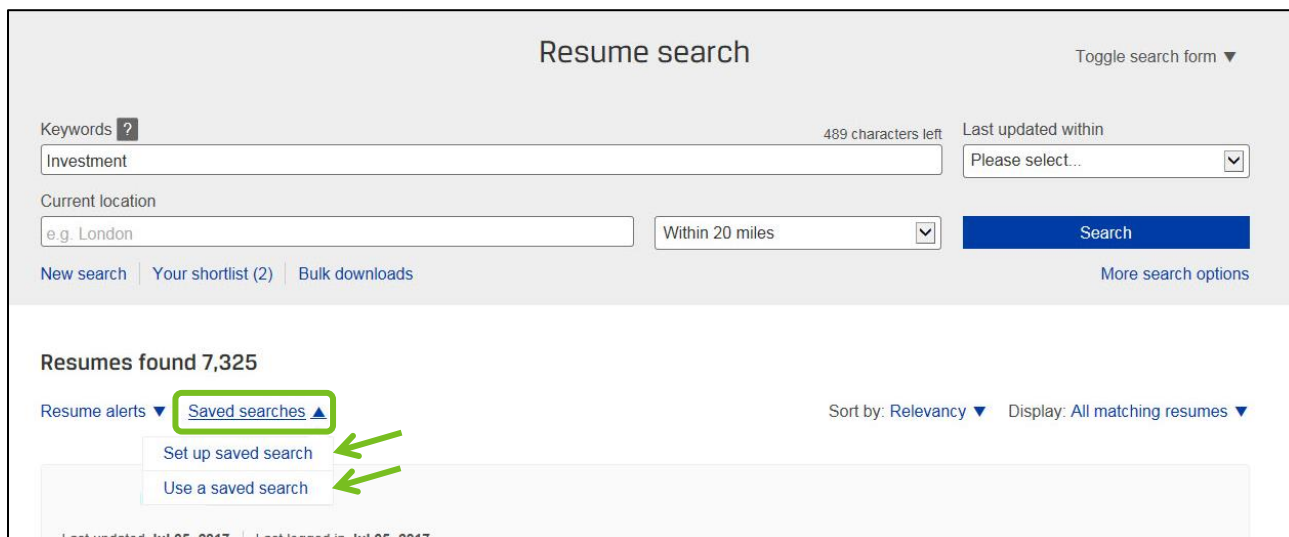
2. Name your alert and select how often you wish to be notified. Click **Save**. (*Note: Alert notifications will be sent via email.*)



The screenshot shows a modal dialog box titled 'Set up a resume alert for this search'. The dialog contains the following elements: a title bar with a close button (X), a subtitle 'We will alert you when resumes matching your search criteria are added to the candidate database.', a text input field for 'Name your alert', a dropdown menu for notification frequency with 'Once a day' selected, and two buttons at the bottom: 'Cancel' and 'Save'. A green arrow points to the 'Save' button.

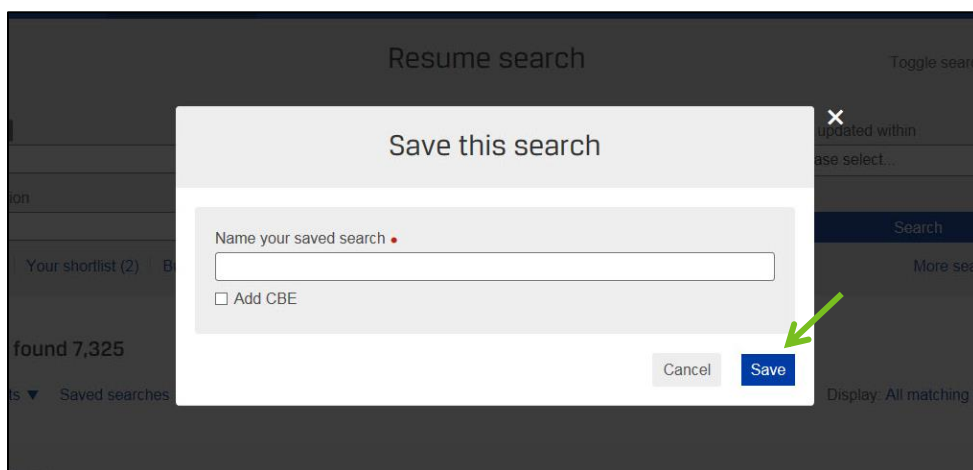
Create Saved Searches

1. From the Resume Search page, create a saved search by clicking the **Saved searches** link then selecting **Set up a saved search**. (*Note: You can access all saved searches by clicking the **Use a saved search** dropdown option.*)



The screenshot shows the 'Resume search' interface. At the top, there is a search form with fields for 'Keywords' (containing 'Investment'), 'Current location' (containing 'e.g. London'), and a distance dropdown (set to 'Within 20 miles'). A 'Search' button is visible. Below the search form, there are links for 'New search', 'Your shortlist (2)', and 'Bulk downloads'. The main content area displays 'Resumes found 7,325' and a 'Resume alerts' dropdown menu. The 'Saved searches' option is highlighted with a green box, and two green arrows point to the 'Set up saved search' and 'Use a saved search' options. The background is dimmed.

2. Name your search and click the **Save** button. (*Note: **CBE** is candidate bulk email. Checking this box will send search results directly to your email.*)



The screenshot shows a 'Save this search' dialog box overlaid on the search page. The dialog has a title bar with a close button (X). Inside, there is a text input field labeled 'Name your saved search' with a red dot indicating a required field. Below the input field is a checkbox labeled 'Add CBE'. At the bottom right of the dialog are two buttons: 'Cancel' and 'Save'. A green arrow points to the 'Save' button. The background is dimmed.