



LinkedIn Template for Connection Request / Outreach to Alumnus

SUBJECT: [University Name] Student – [Industry Abbreviation, e.g. IB or PE] Internships

"Mr. [Name],

I'm currently a [sophomore / junior / senior] at [University Name] majoring in [Major Name] with internship experience in [Industry Name], and I found your name via LinkedIn. I'm messaging you because I'm interested in a career in [Industry Name], and I saw that you work for [Firm Name].

It would be great to connect so we could speak in the future as I learn more about [Industry Name].

Thanks,

[Your Name]"

Email Template for Initial Outreach to Banks – Use This If You Are Asking DIRECTLY for an Internship

SUBJECT: [Bank Name] – Summer Internships

"Dear Mr. / Ms. [Name],

I am writing to you to see if [Bank Name] might be interested in taking an intern in its [Industry Name] team. I am available to start immediately.

I am set to graduate in [Month Year] from [University Name] with a [XX] GPA. I have developed financial modeling and deal analysis skills during my [XX] months of [Industry Name] experience as an intern at [Firm Name]. My resume is attached.

I understand that [Bank Name] has a formalized recruitment process, but if the [Industry Name] team is currently experiencing high deal flow then I could be of assistance.

Would it be possible to arrange a call? I would be very grateful for an opportunity to discuss this with you.

Thank you,

[Your Name]"

Email Template for Outreach to Alumni – Use This If You Are Still Asking Directly About an Internship, But You're Asking an Alumnus

SUBJECT: [University Name] Student – Investment Banking Internships

<http://breakingintowallstreet.com>

<http://www.mergersandinquisitions.com>



"Dear Mr. / Ms. **[Name]**,

My name is **[Your Name]**, and I'm currently a **[sophomore / junior / senior]** at **[University Name]**. I've been interning at **[Firm Name]** in a **[Industry Name]** analyst role for the past **[XX]** months, and I am currently seeking an investment banking internship for next summer.

I found your name in the alumni database, and immediately became interested in opportunities at your firm. If you are experiencing high deal flow, or you need interns with finance experience to assist with tasks such as due diligence, valuation, financial modeling, or administrative work, I am available for internship opportunities.

I have attached a copy of my resume, and I look forward to hearing from you soon.

Thanks,

[Your Name]"

Email Template for Outreach to Alumni – Use This If You Are Setting Up an Informational Interview Rather Than Asking Directly for an Internship or Job

SUBJECT: [University Name] student seeking career advice

"Dear Mr. / Ms. **[Name]**,

My name is **[Your Name]**, and I'm a student at **[University Name]** who found your contact information via **[LinkedIn / the alumni database]**.

I have had experience in **[Industry Name]** during my **[XX]**-month internship at **[Firm Name]**, and now I am seeking an investment banking internship in **[City Name]** next summer to pursue a finance career there.

I see that you made a similar transition from another field of finance, **[Field Name, e.g. wealth management, equity research, trading, etc.]**, into investment banking, so I was hoping that you might be willing to speak with me for a few minutes to discuss how you made this move successfully.

Thanks, and I look forward to connecting with you soon.

Best regards,

[Your Name]"

Email Template for Outreach to a Referral – Use This If You Are Setting Up an Informational Interview Rather Than Asking Directly for an Internship or Job



SUBJECT: [Person's Name] – Referral

“Dear Mr. / Ms. **[Name]**,

My name is **[Your Name]**, and I have worked closely with **[Person's Name]** in my recent **[XX]**-month **[Industry Name]** internship at **[Firm Name]**. He suggested that I reach out to you, given your expertise in **[Industry Name, e.g. investment banking or sales & trading]**.

I am currently a **[sophomore / junior / senior]** at **[University Name]**, and I am interested in pursuing a career in investment banking.

I am in the midst of summer internship applications right now, and **[Person's Name]** mentioned that you have special insight into the process. I was hoping we could set up a time to speak so that I could ask you a few questions.

I know you're extremely busy, so no worries if you do not have time – but if you do, it would make a big difference in my recruiting efforts.

Thanks in advance,

[Your Name]”

Email Template for Saying “Thank You” After an Informational Interview or Meeting:

SUBJECT: Thanks for your time on [Day]

“Dear Mr. / Ms. **[Name]**,

Thank you for taking the time to speak with me the other day. I really appreciate the advice you gave me on how best to prepare myself for **[Industry Name]** internships. Your group sounds like it is exactly what I am looking for, and I'm confident that I would fit in well with your team at **[Bank Name]**.

Thanks again for your time,

[Your Name]”

Follow-Up Email Template If You've Contacted a Senior Banker, But He / She Said the Bank is Not Hiring:

“Dear Mr. / Ms. **[Name]**,

Thank you very much for your quick response.

I was wondering if you might know whether any coverage teams are currently experiencing high deal flow and are in need of an intern. For example, it is my understanding that the



[Industry Name] team recruits interns off cycle. **[Leave out this sentence if you can't say something like this.]**

If any of the coverage teams do have capacity, I could be of immediate assistance given my existing **[Industry Name]** background and financial skill set.

Thanks in advance,

[Your Name]"

Follow-Up Email Template If They Refer You to Another Group:

"Dear Mr. / Ms. **[Name]**,

Following my earlier exchange with **[Person 1]** and **[Person 2]**, I am writing to you about a possible internship in the **[Bank Name]** **[Group Name]** team.

I understand that **[Bank Name]** has a formalized recruitment process for its summer interns. However, if there is flexibility, I feel that I could be of considerable assistance to the team given my existing **[Industry Name]** background and financial skill set.

Best regards,

[Your Name]"