

Credit Analyst Internship

Job Description Example | [Year]

Overview

[Company Name] is offering a dynamic Credit Analyst Internship program designed for motivated students seeking to build a career in Accounting, Finance, Credit, or Risk Management. This internship is intended for highly qualified college or university students currently pursuing a bachelor's degree.

As an intern, the individual will support the analysis of customer financial information, assist in evaluating credit risk, and contribute to recommendations for appropriate credit exposure. The role provides hands-on, real-world experience integrating financial data with market and industry trends to develop comprehensive risk profiles. The program also supports the development of business communication, problem-solving, and project management skills.

Responsibilities

- Participate fully in the company's internship program and related learning activities
- Collaborate with internal teams and external contacts to obtain financial and business information
- Perform industry and market analysis across a diverse customer portfolio
- Assist with financial statement analysis and data interpretation
- Prepare and present credit recommendations in alignment with company credit and risk policies
- Utilize third-party information sources and internal systems to support credit evaluations
- Build effective working relationships across departments

Internship Details

Schedule	Full-time, [onsite / hybrid / remote]
Compensation	Paid internship ([hourly rate or competitive])
Dates	[Start Date] through [End Date]
Location	[City, State or Headquarters]

Qualifications

- Currently enrolled in a bachelor's degree program in Accounting, Finance, Risk Management, or a related field
- Preferred academic standing as a Junior or Senior, or completion of relevant coursework emphasizing financial statement analysis
- Strong analytical and critical thinking skills
- Effective written and verbal communication skills
- Ability to take initiative and work independently while collaborating with a team

Equal Opportunity Statement

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, veteran status, or any other status protected by applicable law.

School Outreach Email Example

A ready-to-personalize letter to department chairs and program coordinators. Replace bracketed placeholders with your specifics before sending.

Subject Line

Partnership Opportunity with [Your Company Name]

Email Body

Dear [Department Chair / Program Coordinator's Name],

I hope this message finds you well. My name is [Your Name], and I represent [Your Company Name], a [brief description of your company / industry].

I am reaching out to explore the opportunity to build a meaningful partnership with your Business Department. We are very interested in supporting your students' professional development and helping bridge the gap between academic learning and real-world industry experience.

Specifically, we would love to collaborate in the following ways:

- Participate in career fairs, as well as career events such as guest lectures, panels, and networking sessions
- Host students for company tours to provide firsthand exposure to our industry
- Develop internship opportunities and consider your students for future roles within our organization

We believe that partnering with your department would be mutually beneficial, allowing us to connect with emerging talent while providing students with valuable insights and opportunities.

I would welcome the chance to discuss how we can tailor this partnership to best support your program and students. Please let me know a convenient time to connect.

Thank you for your time and consideration. I look forward to the possibility of working together.

Warm regards,

[Your Full Name]

[Your Title]

[Your Company Name]

[Your Phone Number]

[Your Email Address]

Training Agenda Example

A customizable Day 1 and Day 2 schedule for orientation, role training, and core processes.

Program Information

Department / Team	[Department / Team Name]
Location	[On-site / Hybrid / Remote]
Work Hours	[e.g., 8:00 a.m. – 5:00 p.m. Monday – Friday]
Internship Dates	[Start Date] – [End Date]
Manager	[Name, Title]
Supervisor	[Name, Title]

Purpose: This agenda outlines a proposed onboarding and training plan for an intern. Adjust times, topics, and owners to match your business needs.

Day 1: Orientation & Setup

Time	Topic / Activity	Owner
8:00 – 8:30	Welcome & overview	[Manager / Supervisor]
8:30 – 9:15	Company basics	[Manager / Supervisor]
9:15 – 10:15	Team intro	[Manager / Supervisor]
10:15 – 10:30	Break	—
10:30 – 11:30	Role expectations	[Supervisor]
11:30 – 12:00	Policies & safety	[Supervisor]
12:00 – 1:00	Lunch	—
1:00 – 2:30	Tech setup	[Supervisor]
2:30 – 2:45	Break	—
2:45 – 3:45	Tools overview	[Supervisor]
3:45 – 4:30	Wrap-up	[Supervisor]

Day 2: Role Training & Core Processes

Notes: Replace the topics below with your department's key workflows, tools, and terminology.

Time	Topic / Activity	Owner
8:00 – 8:15	Daily check-in	[Supervisor]
8:15 – 9:30	Process overview (1)	[Supervisor]
9:30 – 10:15	Standards	[Supervisor]
10:15 – 10:30	Break	—
10:30 – 11:30	Tool training	[Supervisor]
11:30 – 12:00	Quality checks	[Supervisor]
12:00 – 1:00	Lunch	—
1:00 – 2:15	Practice task	[Supervisor]
2:15 – 2:30	Break	—
2:30 – 3:30	Process overview (2)	[Supervisor]
3:30 – 4:30	Wrap-up	[Supervisor]

Beyond Day 2: Schedule short meetings with different departments so interns can learn more about the company and explore other careers and opportunities available at your company.

Social Media Promotion Example

A short checklist plus caption templates for promoting internships and intern spotlights.

Best Practices Checklist

- **One call to action per post:** Apply, register, or learn more.
- **Show proof:** real intern stories, day-in-the-life, project impact (high level).
- **Employee posting contest idea:** run a “day in the life” challenge (with clear rules and approval) to boost authentic reach.
- **Include specifics:** pay (if allowed), location / remote, dates, eligibility, deadline.
- **Posting frequency:** one to two posts per week during recruiting, plus one deadline reminder.
- **Use employees:** ask mentors / managers to reshare with a short personal note.
- **Follow policies:** get consent for photos; do not share confidential or client details.
- **Track:** clicks to careers page + applications from social.

Quick Caption Templates

Applications Open

“We're hiring [Internship Title] interns for [Season / Year]. Apply by [date]: [careers page].”

Intern Spotlight

“Meet [Name], our [Title] intern. They're learning [skill] and working on [project]. Apply: [careers page].”

Performance Evaluation Example

A template to guide structured midterm and final reviews. Use during scheduled feedback meetings with the intern.

Instructions for Intern Managers: Please evaluate your intern using the resources below. Once completed, schedule a meeting with your intern to discuss the evaluation. This form will be used to complete the mid-term and final performance evaluations.

Step 1 — Goals

Goal Achievement is the main measure of overall performance. Please enter the intern's goals below and record their current rating for each by circling the correct level. Be sure to have specific examples supporting your ratings.

Goal 1: (Goal Title)	Did Not Achieve Expectations	Partially Achieved Expectations	Achieved Expectations	Exceeded Expectations	Far Exceeded Expectations
Comments:					

Goal 2: (Goal Title)	Did Not Achieve Expectations	Partially Achieved Expectations	Achieved Expectations	Exceeded Expectations	Far Exceeded Expectations
Comments:					

Goal 3: (Goal Title)	Did Not Achieve Expectations	Partially Achieved Expectations	Achieved Expectations	Exceeded Expectations	Far Exceeded Expectations
Comments:					

Goal 4: (Goal Title)	Did Not Achieve Expectations	Partially Achieved Expectations	Achieved Expectations	Exceeded Expectations	Far Exceeded Expectations
Comments:					

Step 2 – Supplemental Performance Ratings

Please mark an “X” in the appropriate column for these additional key areas of performance.

Attribute	Exceeds Expectations 1	Meets All Expectations 2	Meets Some Expectations 3	Does Not Meet Expectations 4
Technical Knowledge: Has the technical foundation to succeed in their function and add value to our team upon completion of his / her degree				
Job Knowledge: Displays an understanding of job requirements and understands his / her part in achieving departmental and company goals				

Attribute	Exceeds Expectations 1	Meets All Expectations 2	Meets Some Expectations 3	Does Not Meet Expectations 4
<p>Quality of Work: Produces work that is error-free the first time with little waste or redone work</p>				
<p>Quantity of Work: Overall work style is effective and productive in terms of time management, planning, setting priorities; executes and follows through on commitments across a variety of work challenges</p>				
<p>Accountability: Displays a conscientious commitment to getting the job done while meeting specified time targets; takes personal responsibility and ownership of his / her actions</p>				
<p>Initiative: Seeks out additional responsibility for the benefit of the larger group, while still completing core assignments; proactively identifies areas for process improvement and takes action to implement change</p>				
<p>Judgement: Sets priorities for tasks in order of importance or value; makes appropriate decisions regarding job responsibilities; applies common sense</p>				

Attribute	Exceeds Expectations 1	Meets All Expectations 2	Meets Some Expectations 3	Does Not Meet Expectations 4
Problem Solving: Looks beyond the obvious, asks penetrating questions, and uses logical thinking to derive appropriate and accurate solutions				
Communication: Expresses ideas clearly and effectively both in oral and written communications; asks questions to clarify ambiguous messages; practices active listening				
Flexibility: Is willing and able to adjust to multiple demands, shifting priorities, ambiguity, and rapid change; copes effectively with change				

- 1 **Exceeds Expectations** — Performance consistently exceeds stated goals and objectives. This individual would raise the level of talent in our organization.
- 2 **Meets All Expectations** — Performs at a fully satisfactory level and occasionally exceeds job performance standards. This individual is a consistent team player and can always be counted on.
- 3 **Meets Some Expectations** — Performance does not meet an acceptable level in all areas. This individual does his / her job, but not always consistently or efficiently.
- 4 **Does Not Meet Expectations** — Performance falls substantially short of job requirements. This individual is not dependable; his / her results are sporadic and inconsistent.

Step 3 – Performance Summary

Please fill in all additional relevant information below.

Review Period & Eval Date (Midpoint or Final)	Final evaluation —
Project Description (A detailed description outlining specific goals and criteria upon which the intern is evaluated)	Completion of assigned annual reviews (to include the updating of appropriate databases, crafting appropriate communications with internal and external customers, creating and managing project management databases)
Overall Performance Rating (Consider goal achievement, competency demonstration, supplemental ratings, and manager / team comments)	<input type="checkbox"/> Unsatisfactory Performance <input type="checkbox"/> Challenging Performance <input type="checkbox"/> Solid Performance <input type="checkbox"/> Excellent Performance <input type="checkbox"/> Outstanding Performance
General Comments from Intern Manager	
General Comments from Mentor &/or Team Members	
Recommendation (YES / NO) to pursue future opportunities?	