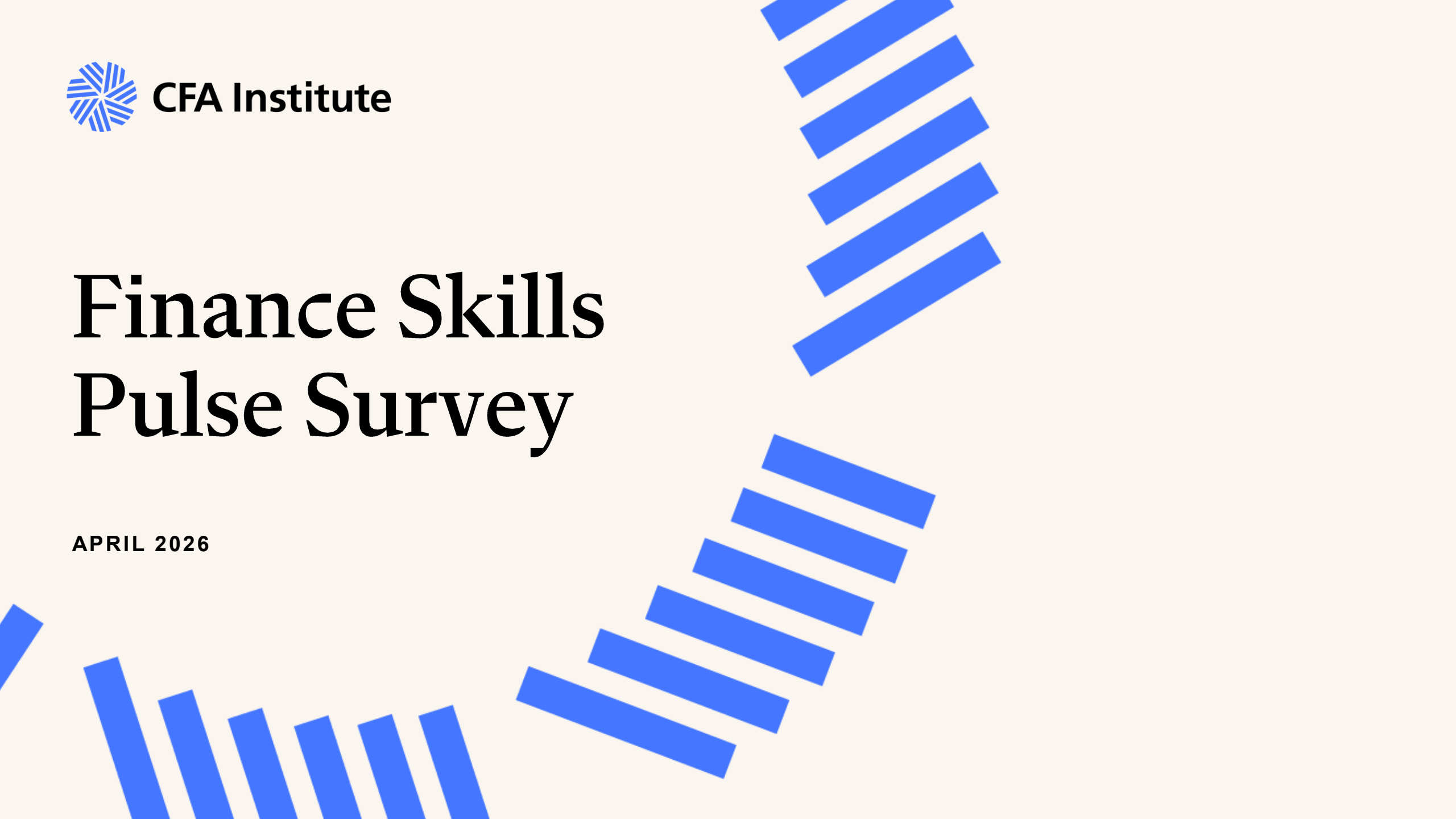




CFA Institute

Finance Skills Pulse Survey

APRIL 2026



Objective

CFA Institute commissioned a survey of finance professionals at a manager level or above across the United States, United Kingdom and Canada to gain insights into the skills shaping the future of the finance profession. The CFA Institute Finance Skills Pulse Survey examines the skills and experiences (e.g., internships, academic performance, credentials, etc.) that drive employability across the finance industry today and expectations for the future based on the perspectives of current financial professionals.

Methodology

The CFA Institute Finance Skills Pulse Survey was fielded via an online survey from March 18-25, 2026, by [3Gem Research & Insights](#) with a sample size of 1,350 finance sector professionals aged 18+ who are currently employed, hold at least a bachelor's degree and are at a manager level or above.

This sample was surveyed on their experience working with or hiring “new career professionals,” which refers to people who are relatively new in the field of finance (e.g., individuals who are new in their roles, switching into the finance sector, or younger finance professionals within the first 0-5 years of their career). Key markets surveyed include:



Canada
n=350



UK
n=500



US
n=500



Indicates combined results across markets
N=1,350



Executive Summary: Insights Across Canada, UK and US Markets

Practical Skills are Non-negotiable on Day One

- When it comes to the skills expected on “day one” from professionals newly entering finance careers, finance professionals at a manager level or above rank Financial Statement Analysis (61%), Excel (47%) and Data Analysis (44%) as the top expectations. While AI for Finance skills are rising (32%), core financial and data fluency remain the baseline.

Finance Firms are Entering a Two-Front Skills Challenge

- Employers increasingly value both soft skills and AI readiness, yet those are the exact areas where new entrants fall short.
- 68% of finance professionals at a manager level or above say soft skills make new entrants most employable today, yet 53% identify soft skills as the biggest skills gap.
- 52% say AI skills drive employability, yet 43% report AI skills are deficient among new entrants.
- Only 42% say new entrants are “very prepared” for the skills their roles require, underscoring the need to go beyond baseline skills and for continuous upskilling.



Executive Summary: Insights Across Canada, UK and US Markets, cont.

AI Is Rising - But Not Replacing Human Skills

- AI is shaping the future of the finance profession as 42% of finance professionals at a manager level or above identify AI as the top emerging skill.
- However, 99% say soft skills are becoming more important, reinforcing that career success will require capabilities beyond AI fluency.

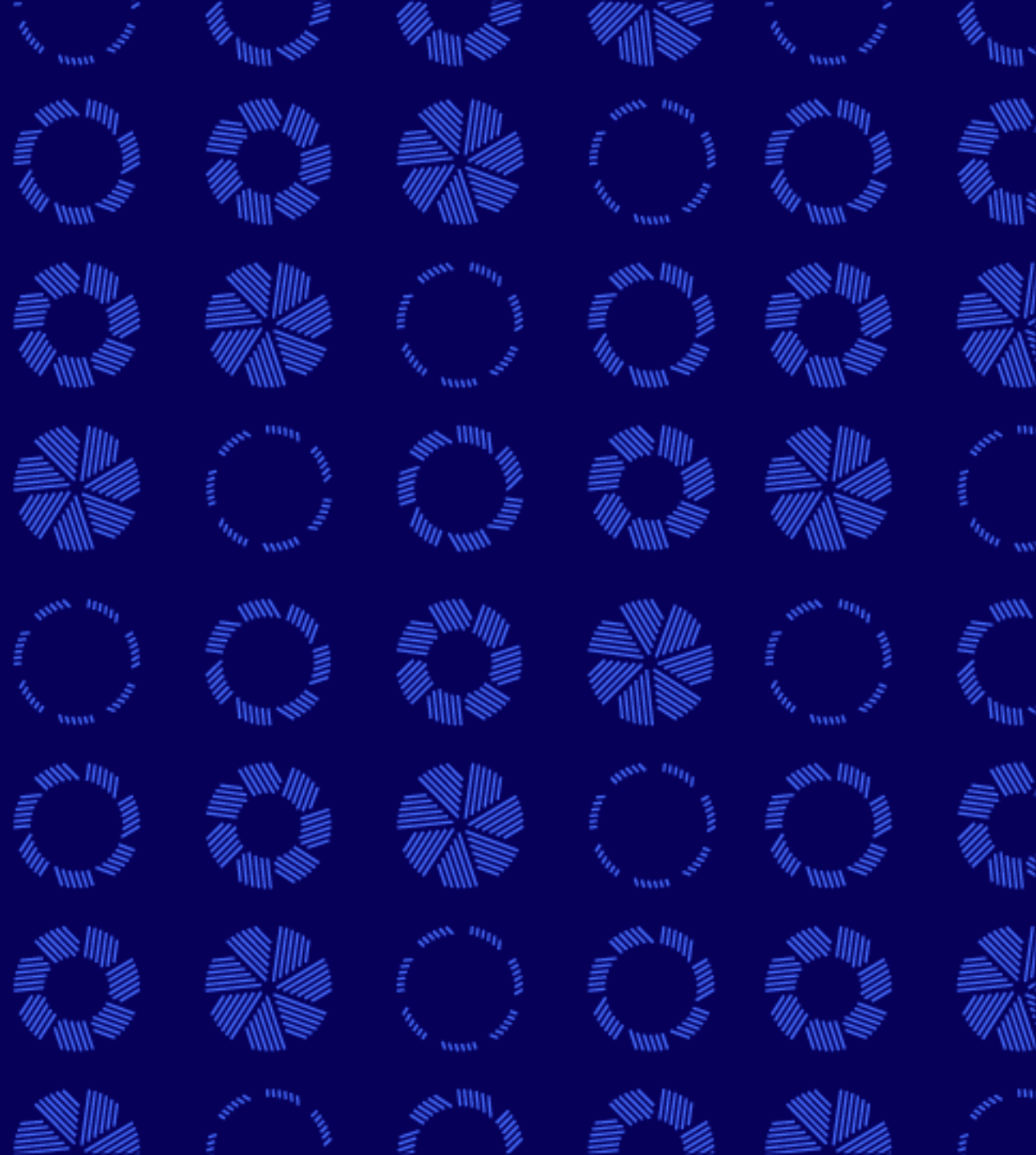
Established Professionals Are Already Adapting

- Finance professionals at a manager level or above are actively closing skills gaps, with 58% developing AI skills and 47% focusing on soft skills.

Soft Skills Drive Promotion. On-the-Job Experience Drives Hiring.

- 1 in 3 finance professionals at a manager level or above cite soft skills as the primary driver of promotion - nearly three times the weight given to AI skills.
- Meanwhile, real-world project experience (56%) and internships (53%) are the top assets that influence hiring decisions across the finance industry, far outpacing university reputation/ranking (21%).

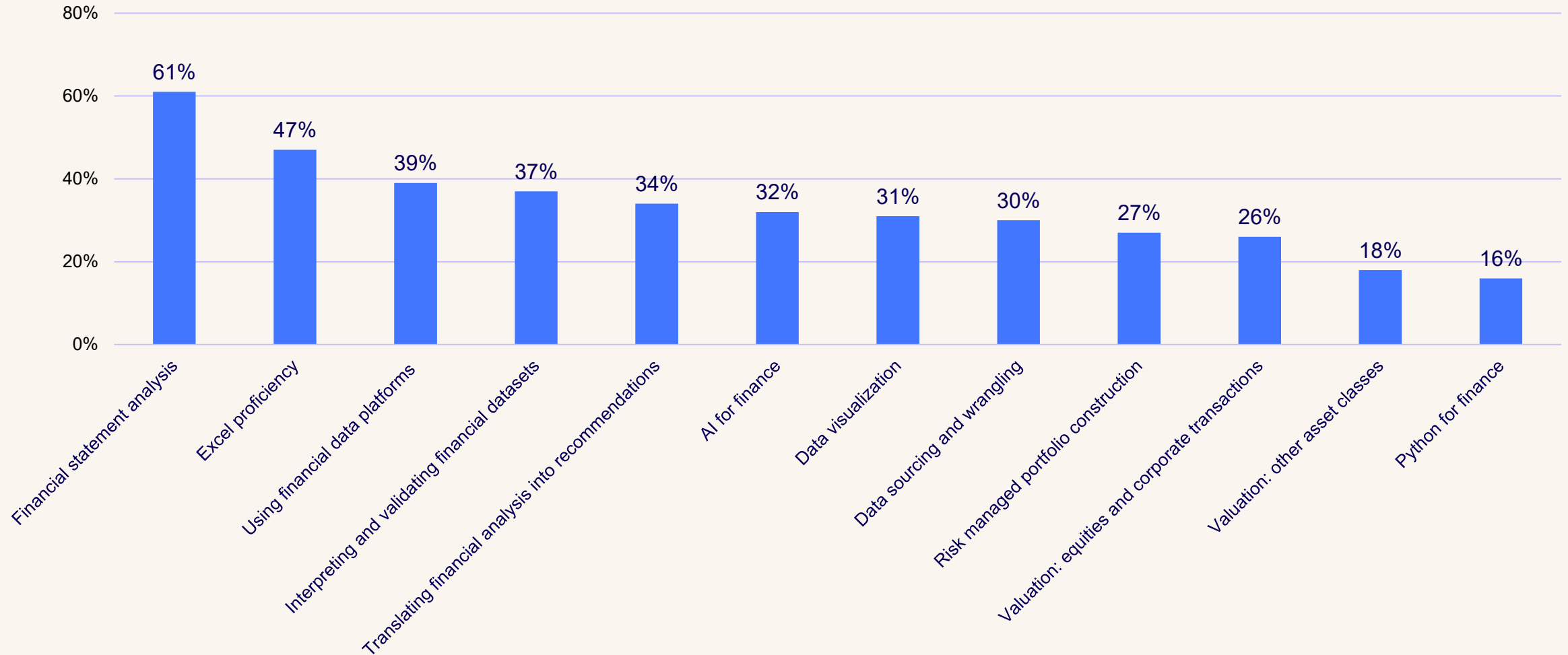
Full Results





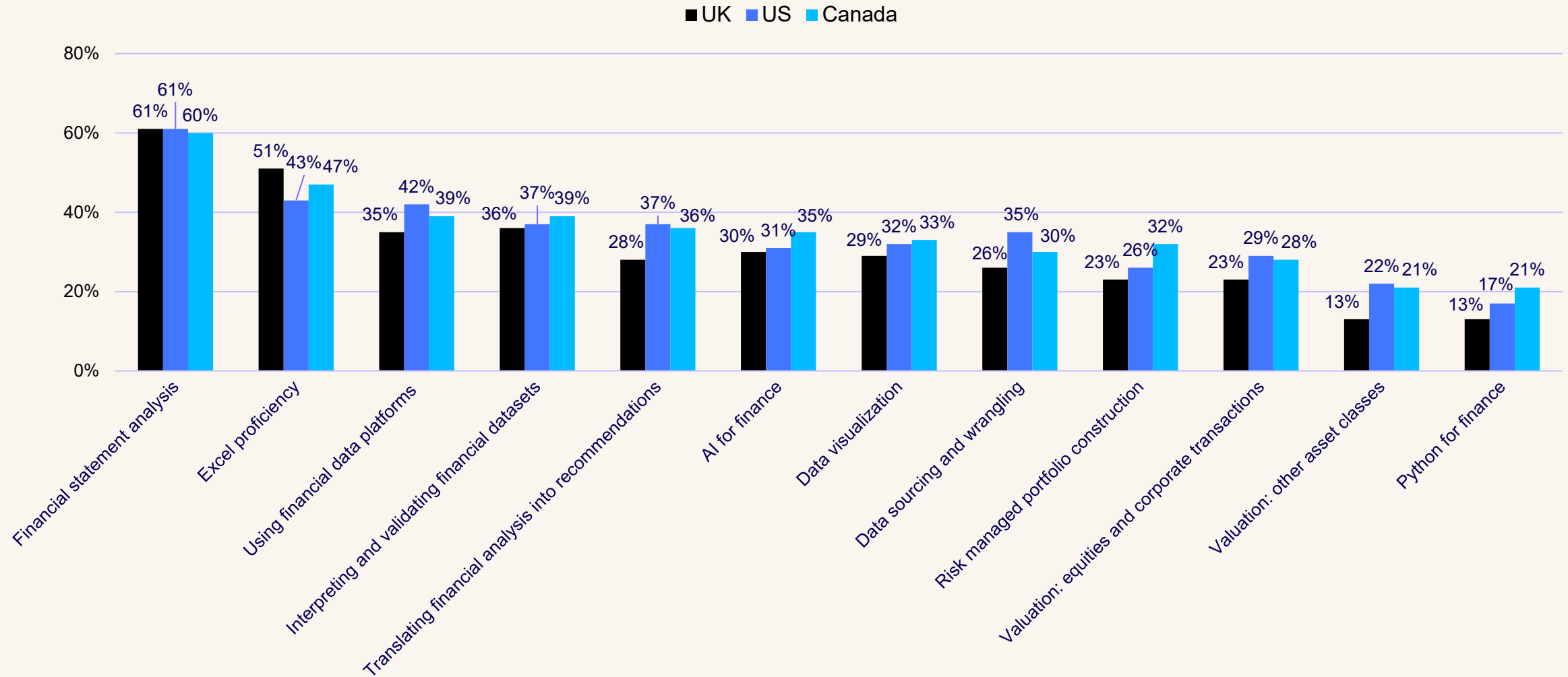
Q1. For professionals newly entering finance careers, which technical skills should they be able to perform confidently on “day one” in the role?

6 in 10 finance professionals at a manager level or above say financial statement analysis is a non-negotiable “day one” skill for new career entrants





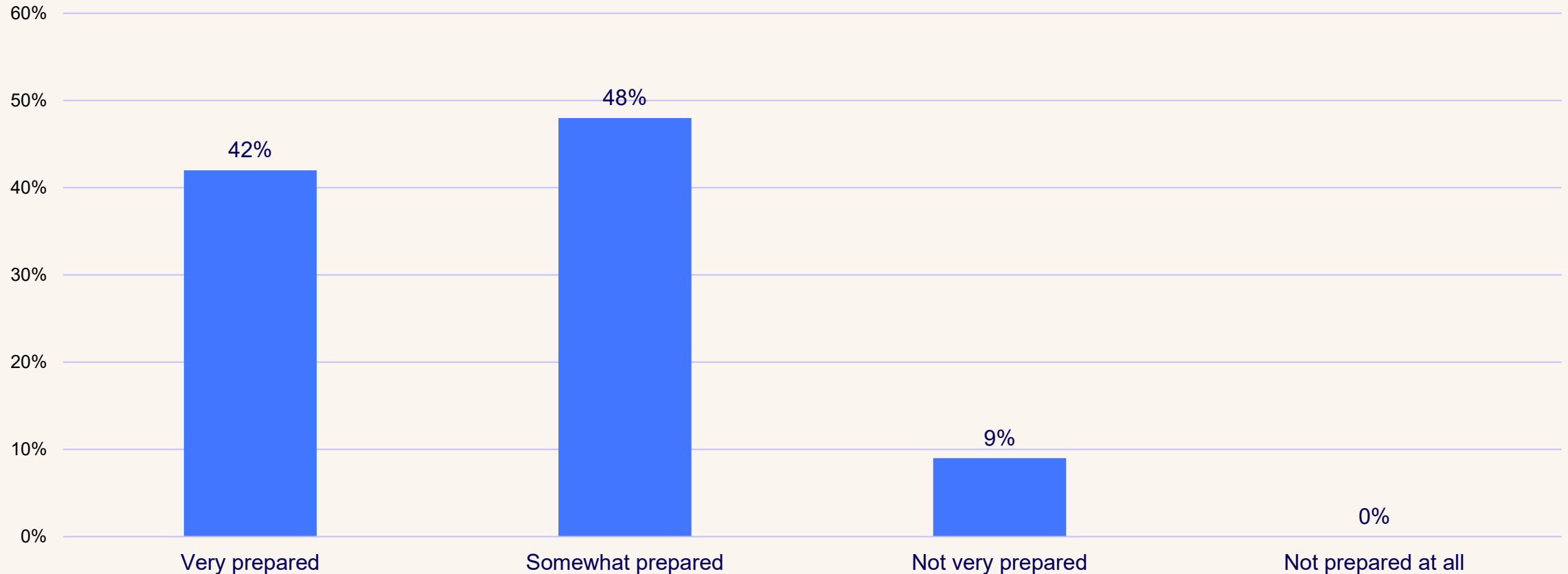
Q1. For professionals newly entering finance careers, which technical skills should they be able to perform confidently on “day one” in the role?





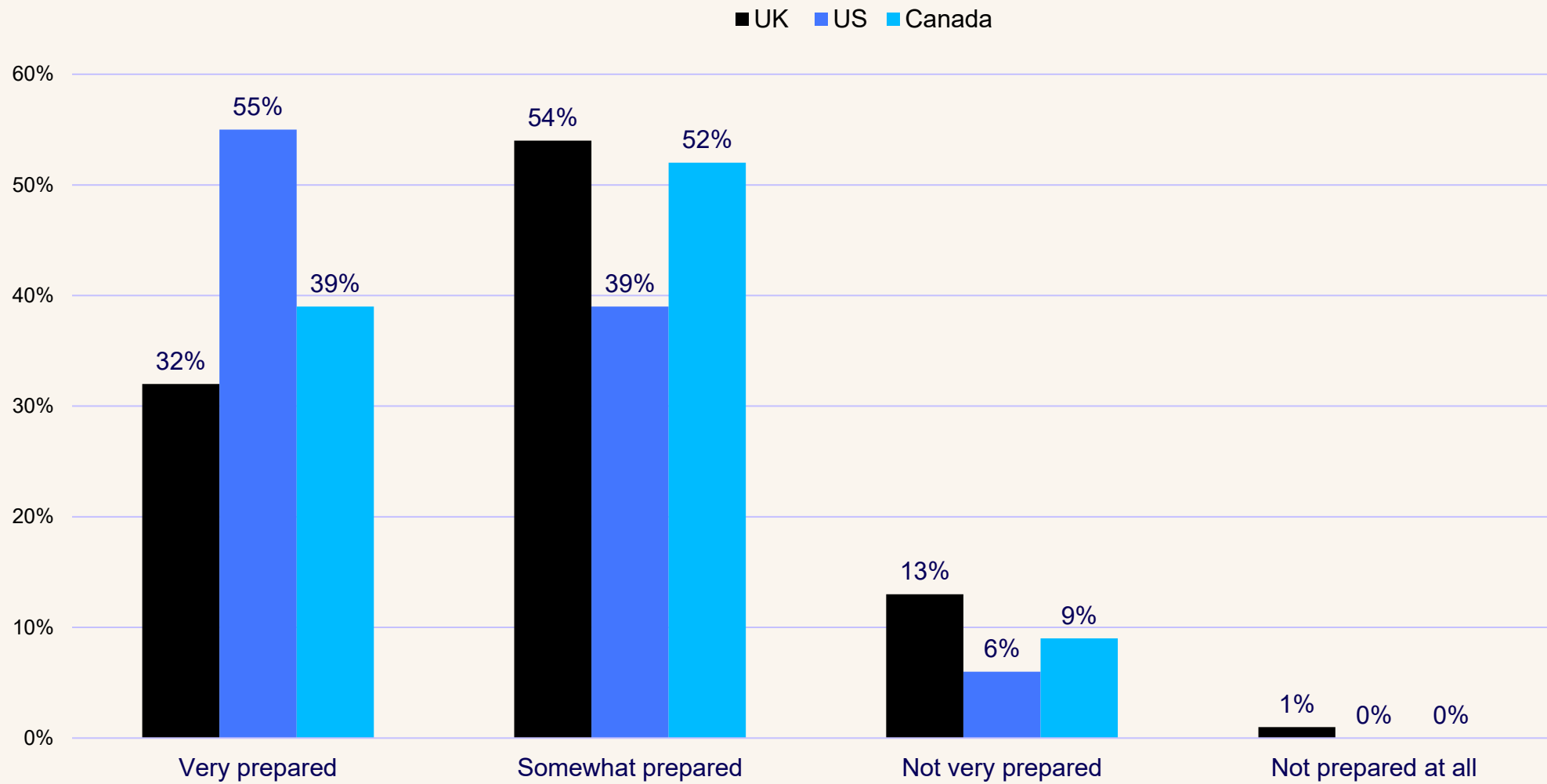
Q2. Overall, how prepared are new career professionals for the skills their finance roles require today? Select only one.

Nearly half of finance professionals at a manager level or above say new career entrants are only “somewhat prepared” for the skills their roles require, suggesting opportunities for continued upskilling to keep up with the rapidly evolving financial landscape





Q2. Overall, how prepared are new career professionals for the skills their finance roles require today? Select only one.

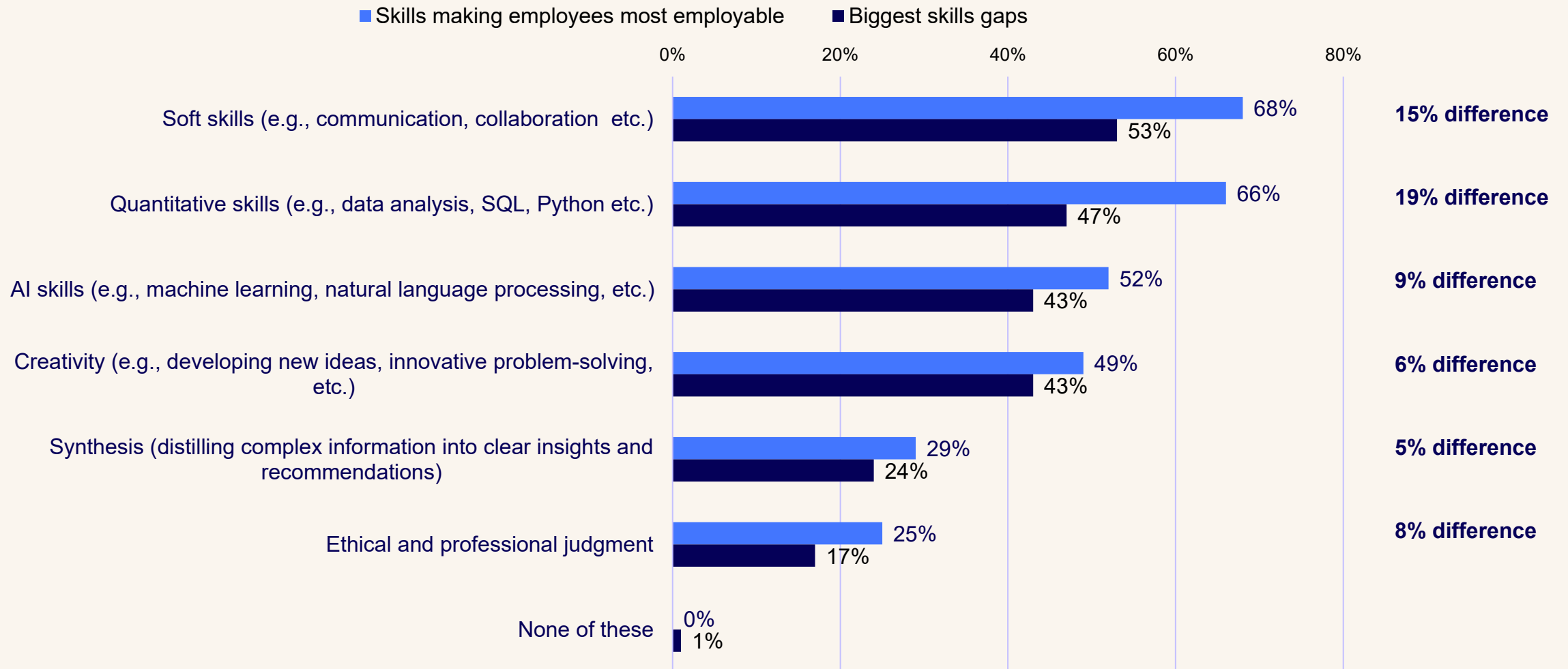




Q3. Which of the following skills make professionals most employable in the field of finance today?

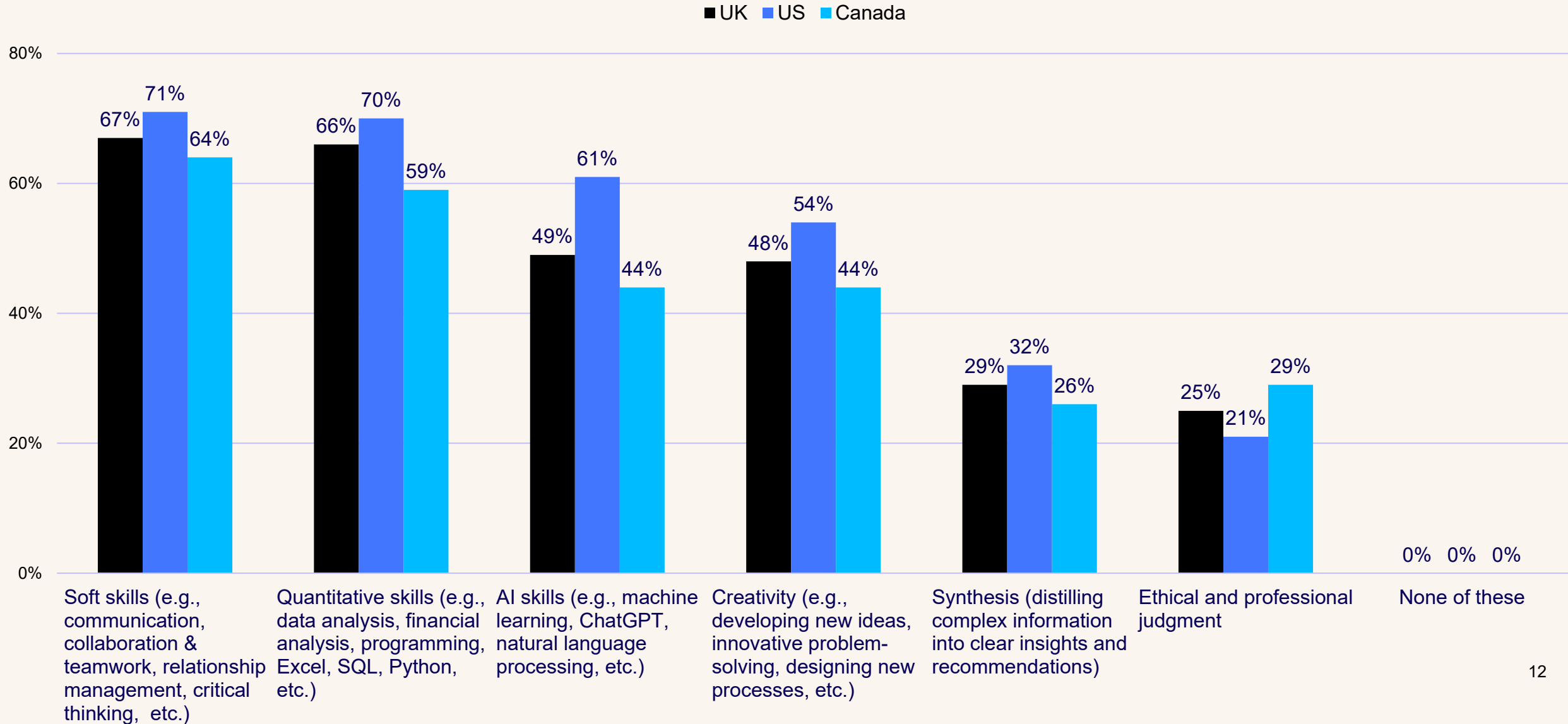
Q4. Where do you see the biggest gaps in new career professionals' skills as they enter finance roles today?

From soft skills to AI and ethical judgment, finance professionals at a manager level or above say new career entrants are falling short on key skills that determine career success



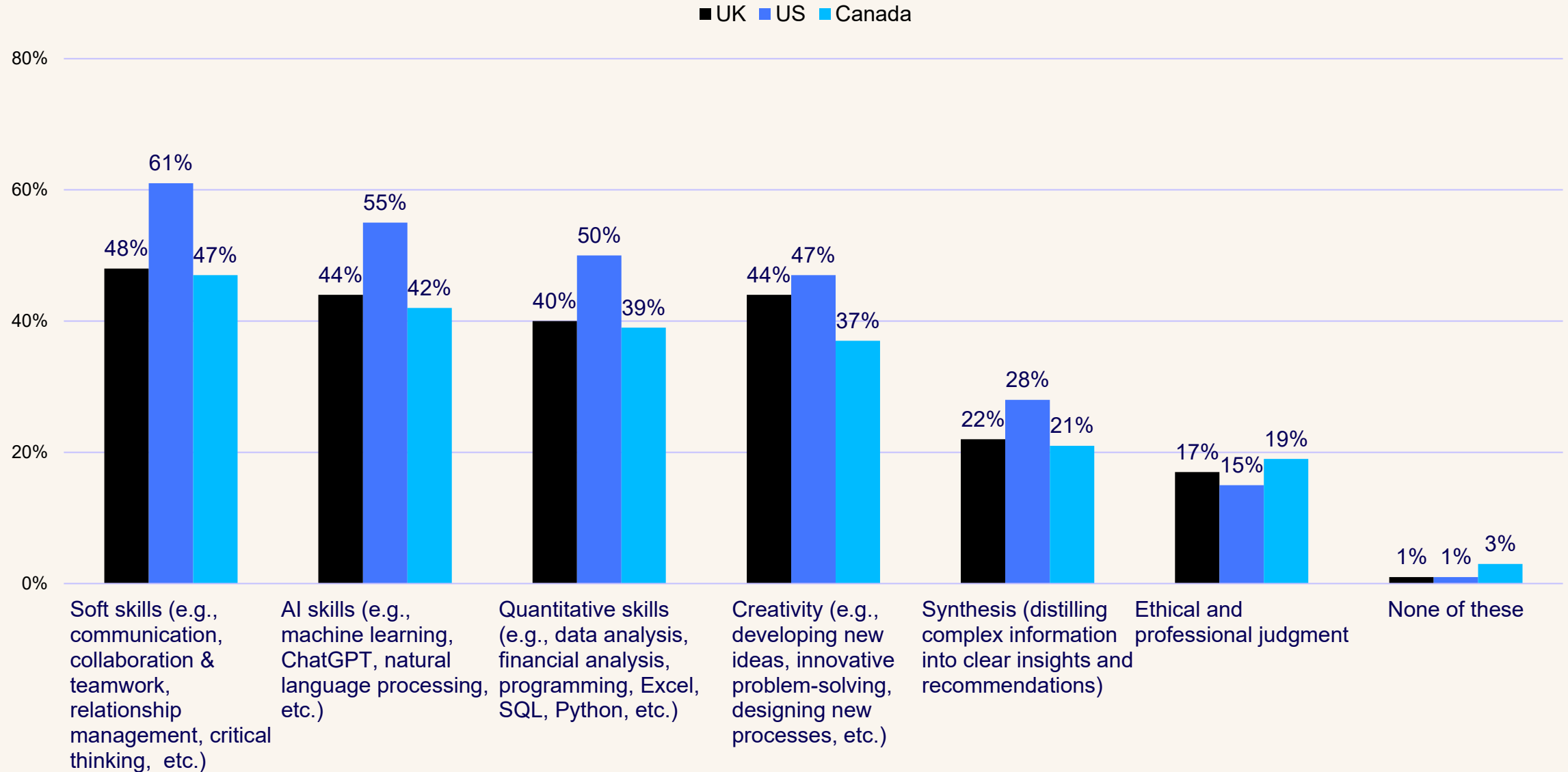


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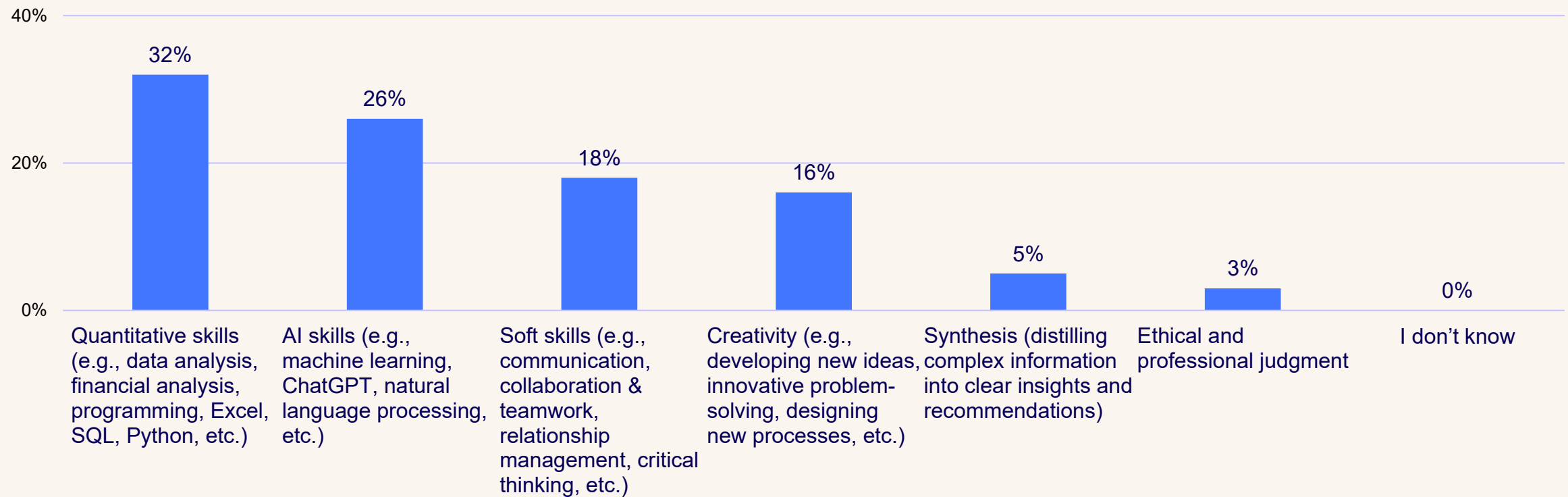
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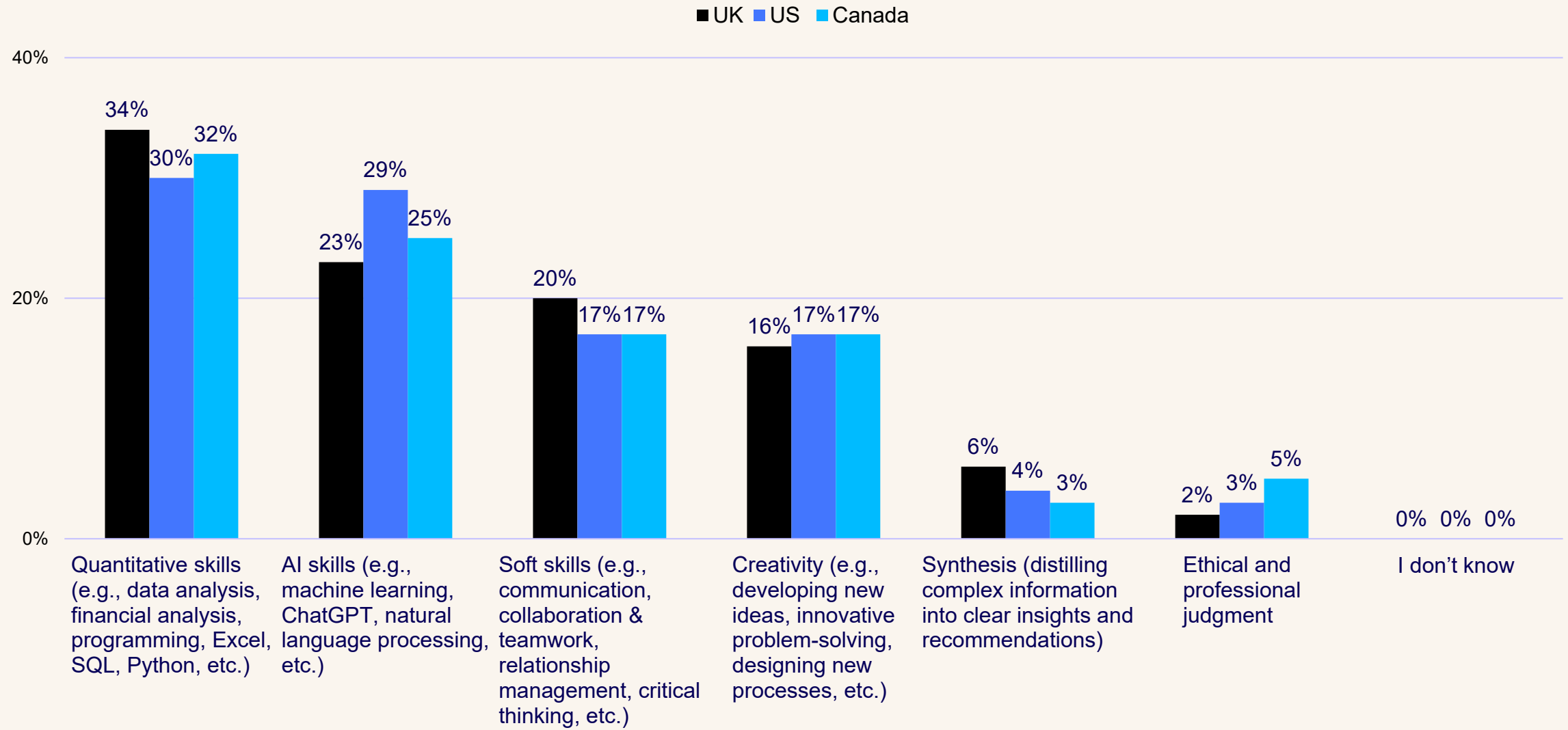
Q5. Overall, which skillset do you consider is the strongest among new career professionals in finance today? Select only one.

Technical skills lead, but no single skillset emerges as a perceived strength, signalling demand for multi-skilled finance talent





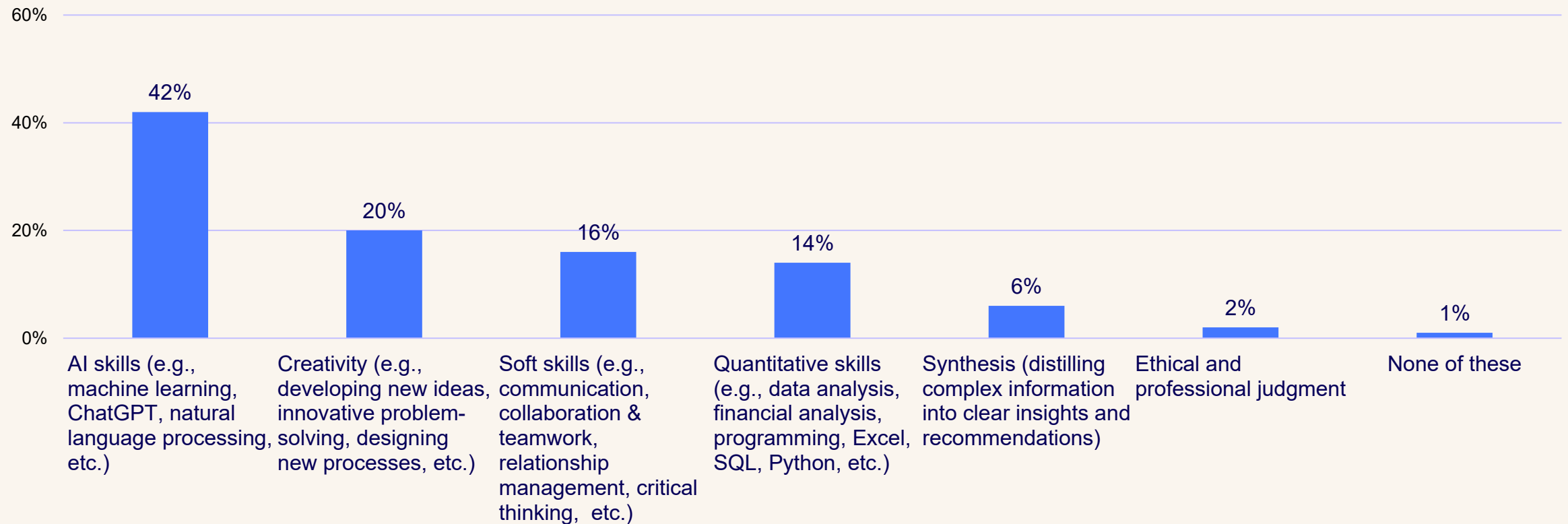
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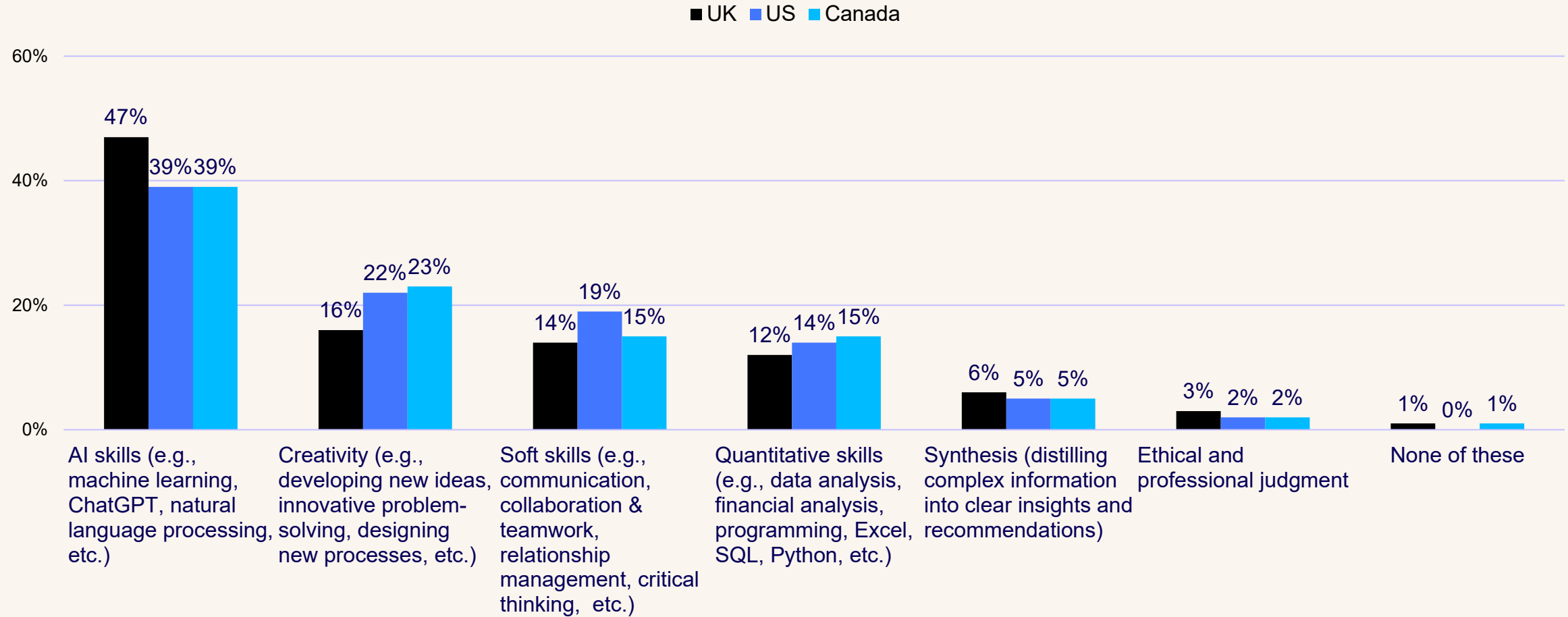
Q6. Which skillset do you consider is emerging as the most important for new career professionals in finance roles? Select only one.

AI is the top emerging skill in finance roles with human skills close behind, highlighting the need for blended technical and soft skills to future proof careers





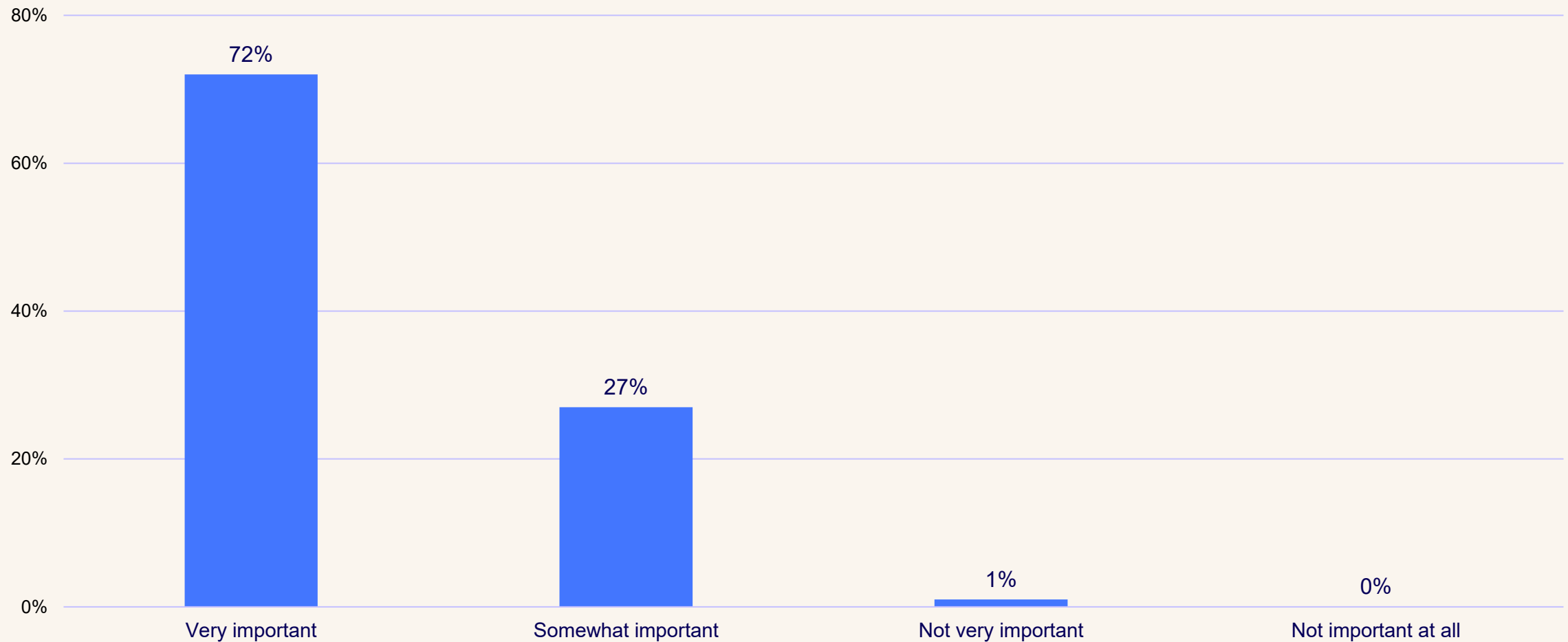
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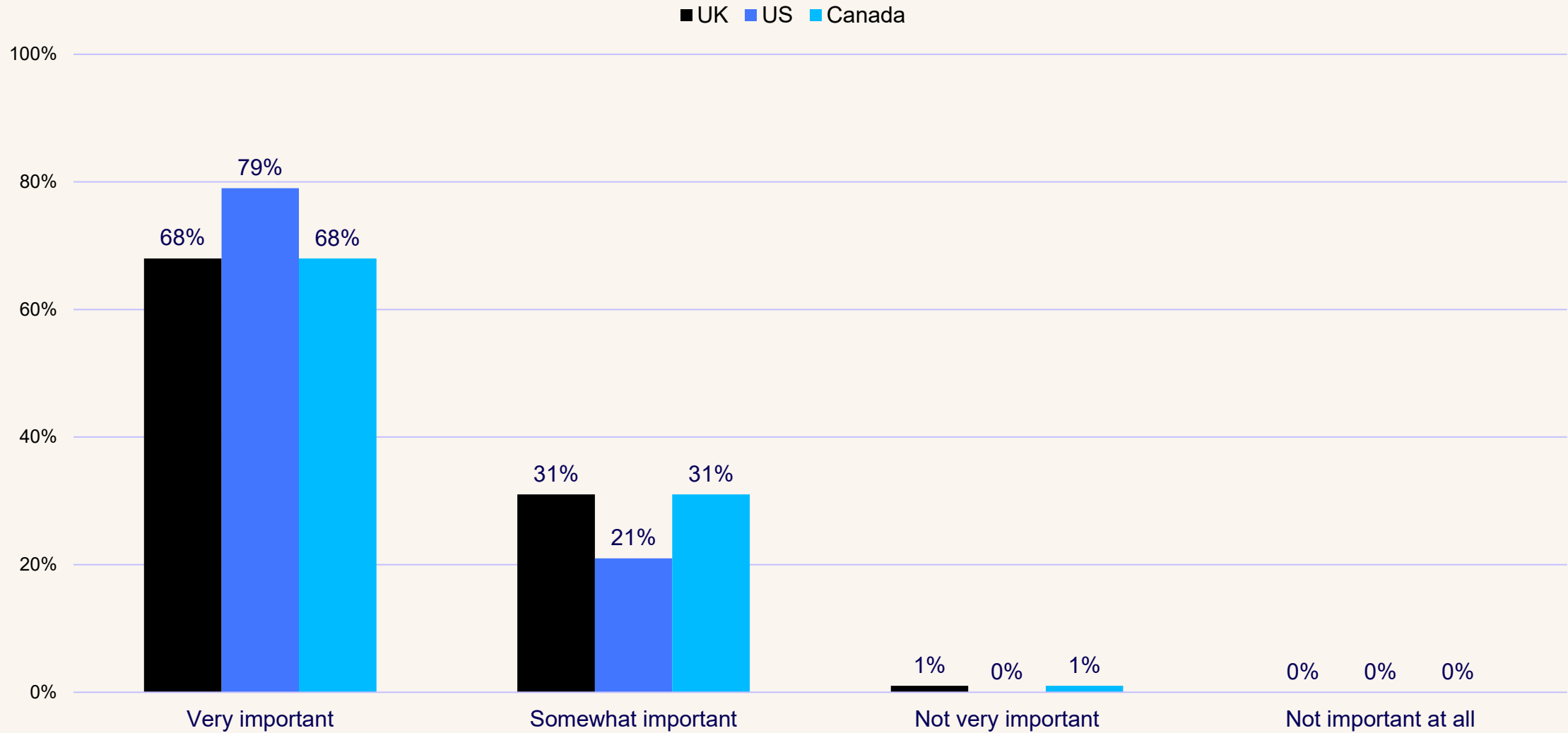
Q7. With the rise of AI and automation across the finance industry, how important is it for new career professionals to develop strong interpersonal and soft skills (e.g., communication, collaboration, creativity, relationship management)? Select only one.

72% of finance professionals at a manager level or above say soft skills are 'very important' in the age of automation, underscoring the importance of blended skillsets





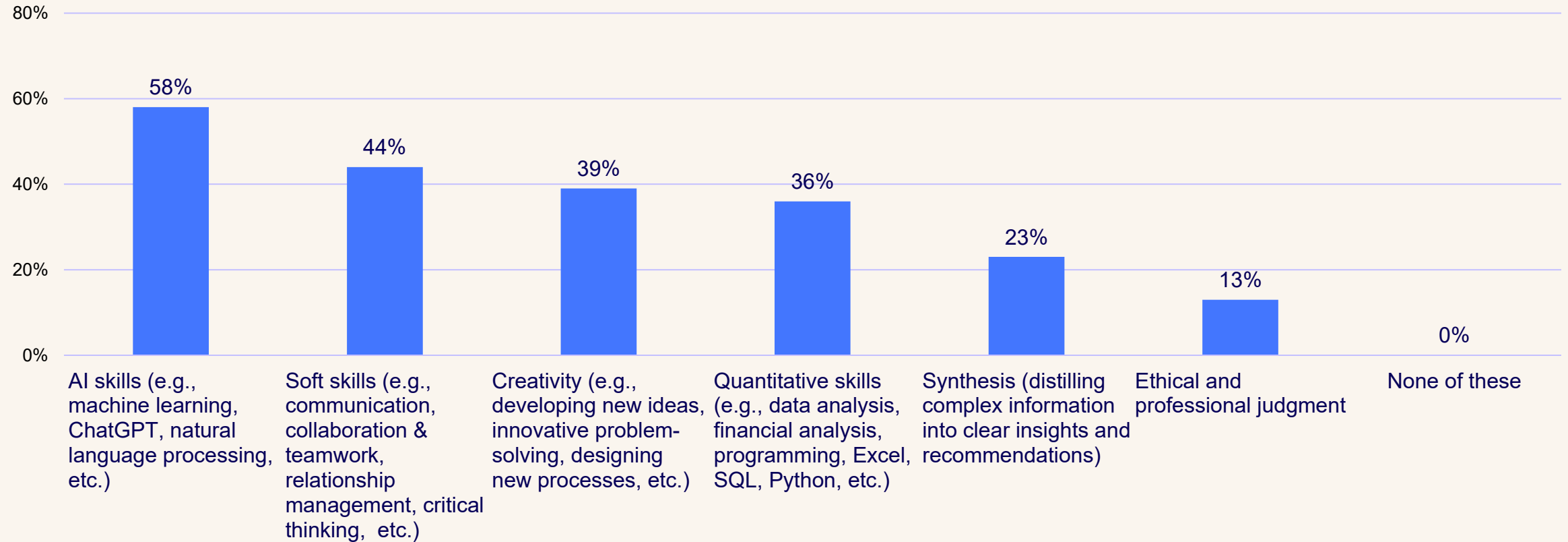
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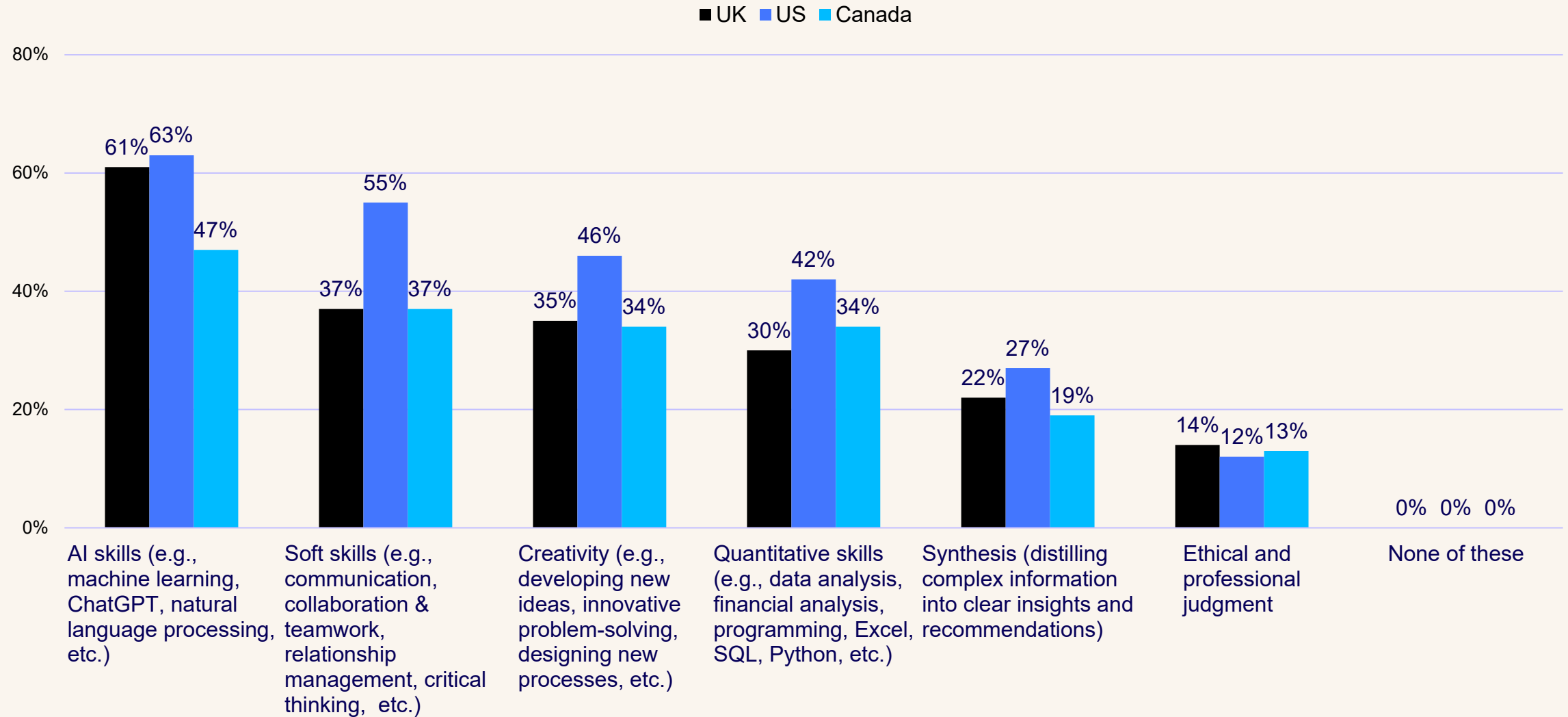
Q8. Which of the following skillsets are you actively developing to reach the next step in your finance career?

Current finance professionals are working to close the gap as 6 in 10 say they are actively building AI skills and nearly half are focusing on soft skills





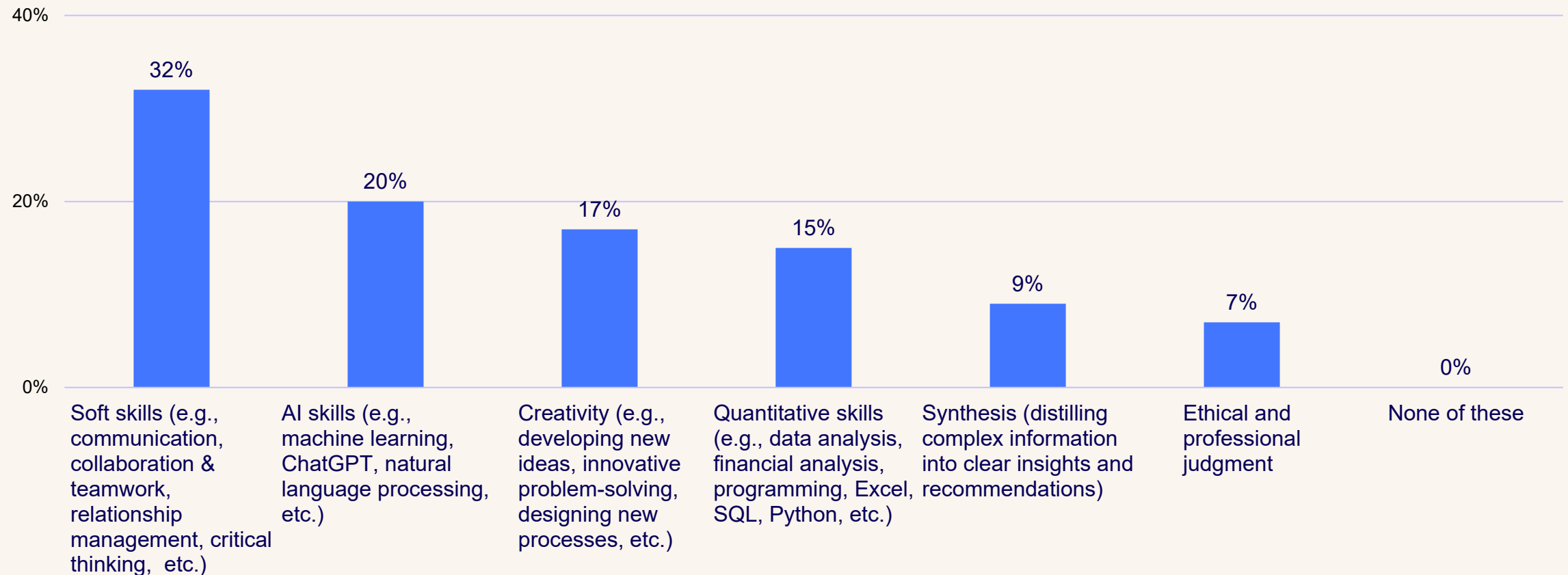
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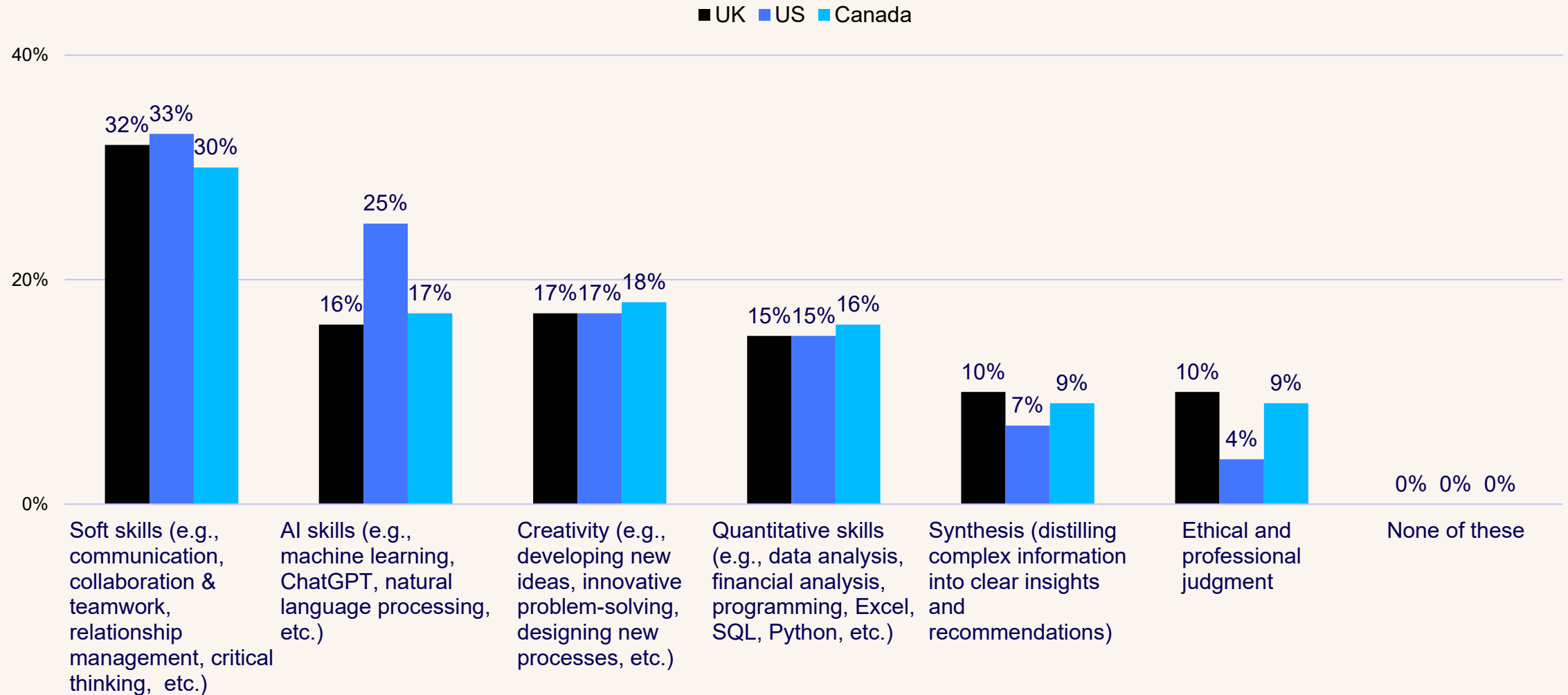
Q9. Thinking about promotions into more senior roles (e.g., roles with team leadership or management responsibilities and greater decision-making authority), which of these skills becomes the most important as people advance into leadership roles? Select only one.

Finance professionals at a manager level or above reveal that soft skills are most likely to unlock leadership promotion





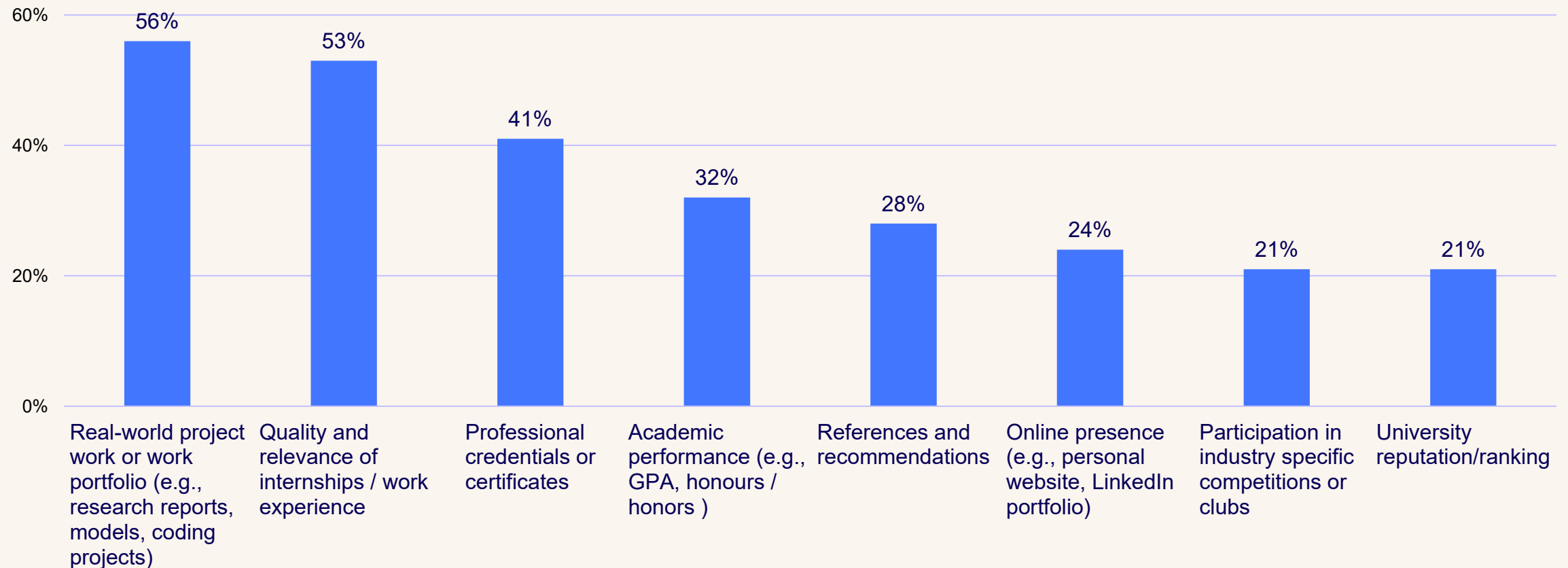
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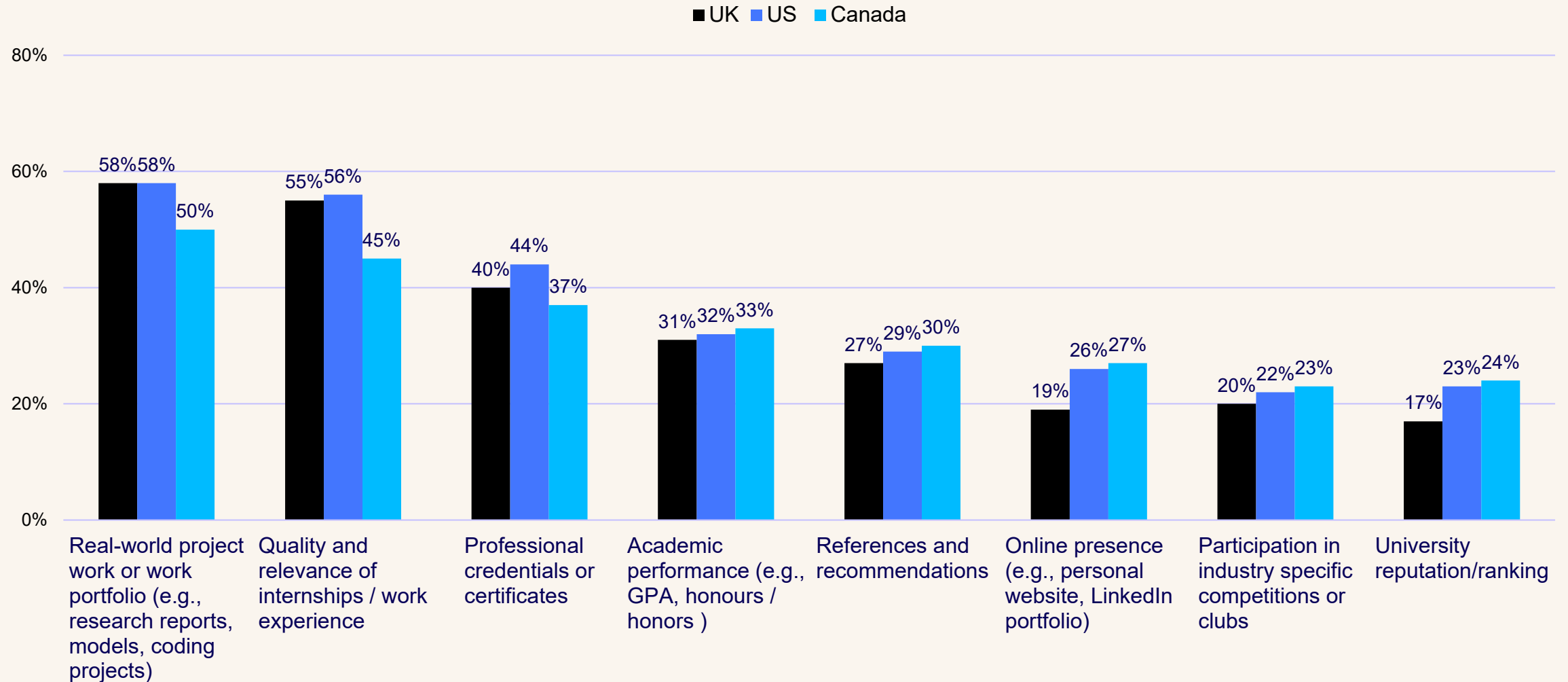
Q10. When you review new career candidates' profiles, which of the following assets is a key decision maker in hiring?

Real-world project work and internship quality drive hiring decisions across the finance industry, outranking university reputation/ranking





Q10. When you review new career candidates' profiles, which of the following assets is a key decision maker in hiring?



Demographics

Demographics



n=500

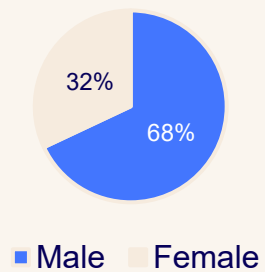
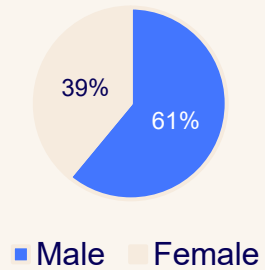
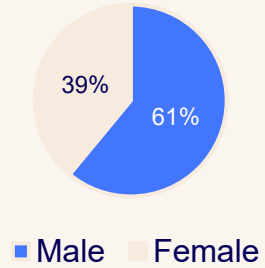


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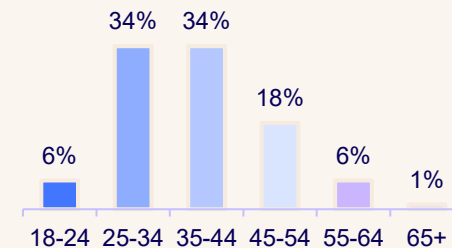
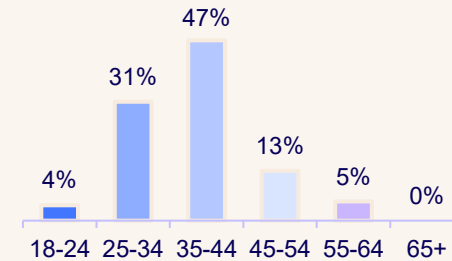
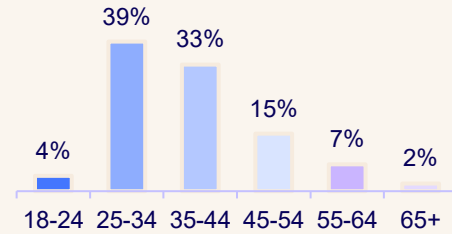


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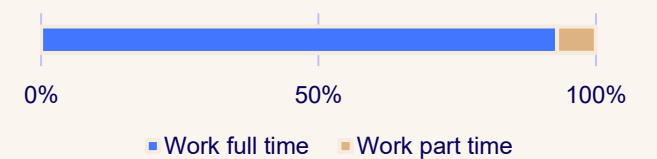
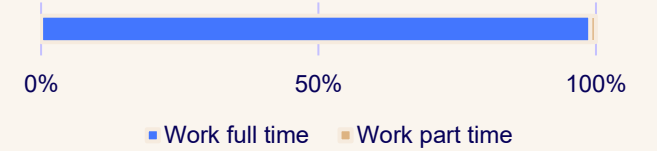
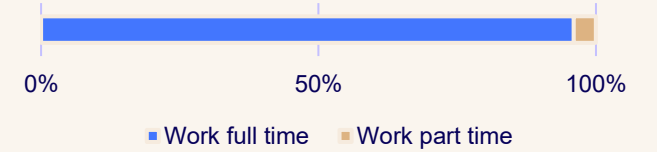
Gender



Age



Employment

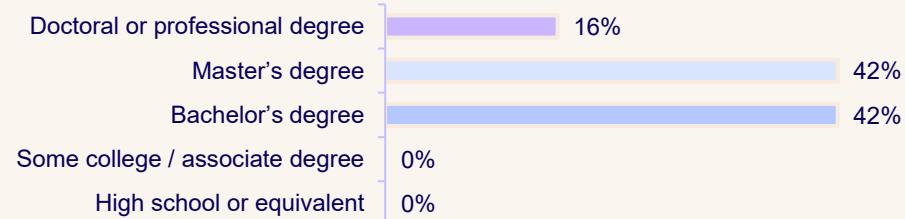


Demographics

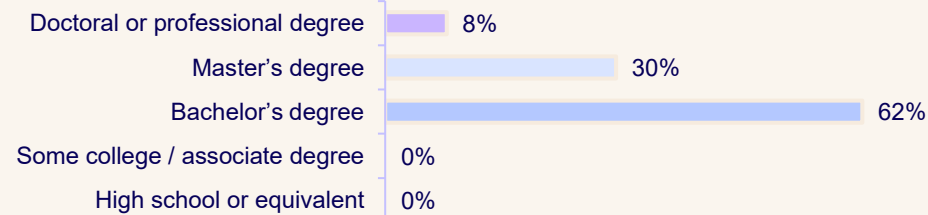


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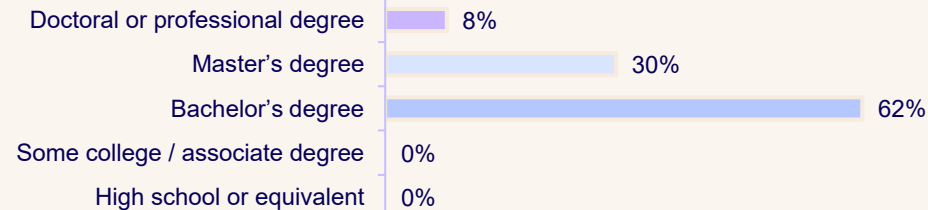
Highest Level of Education



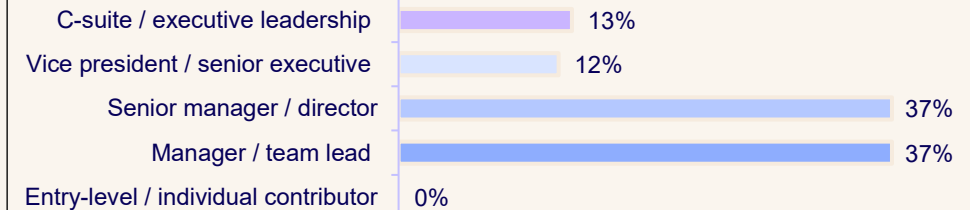
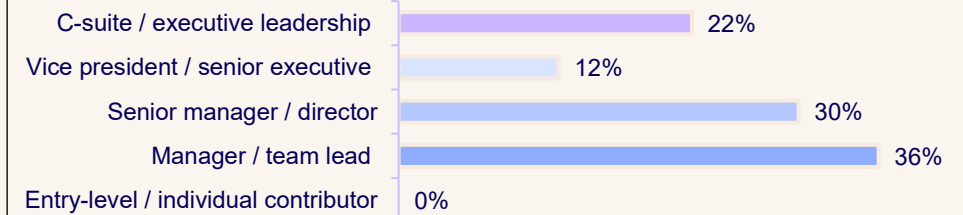
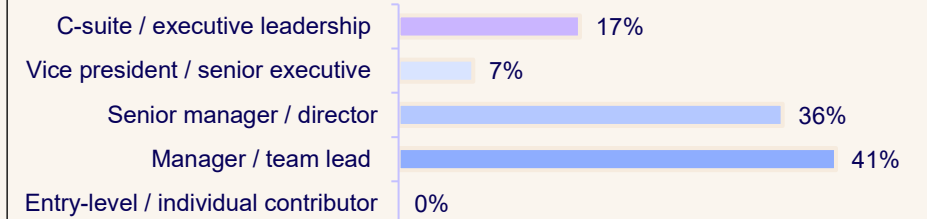
n=500



n=350

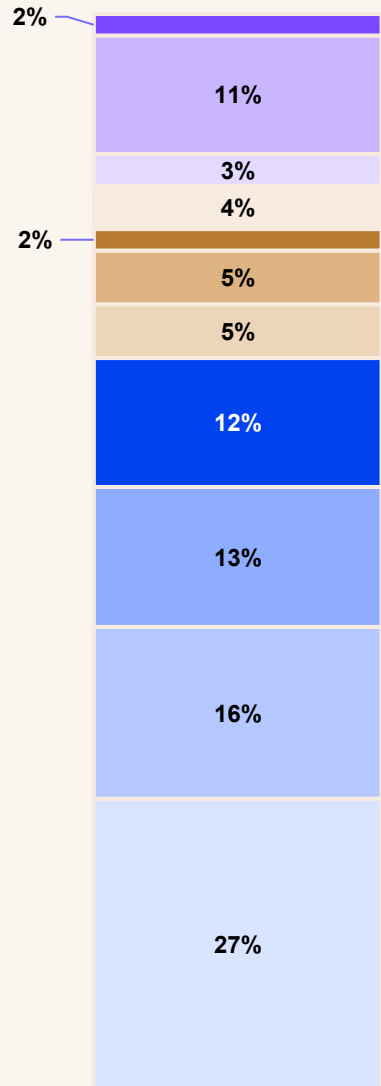


Organization Seniority

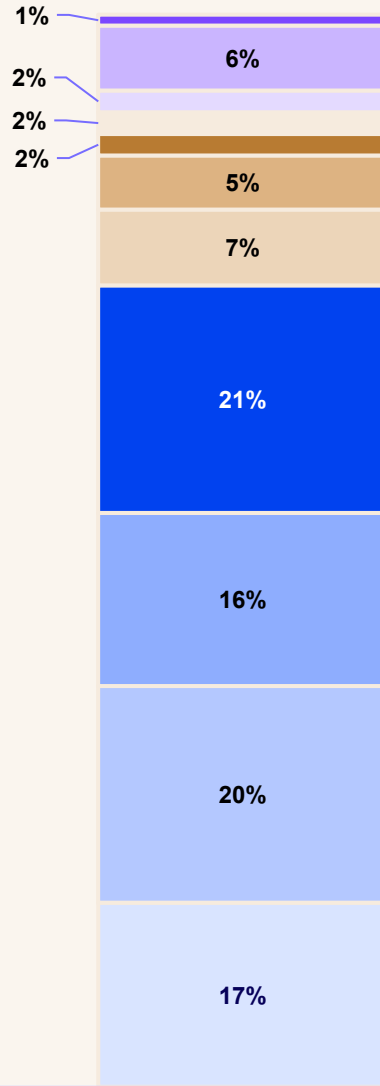


Demographics

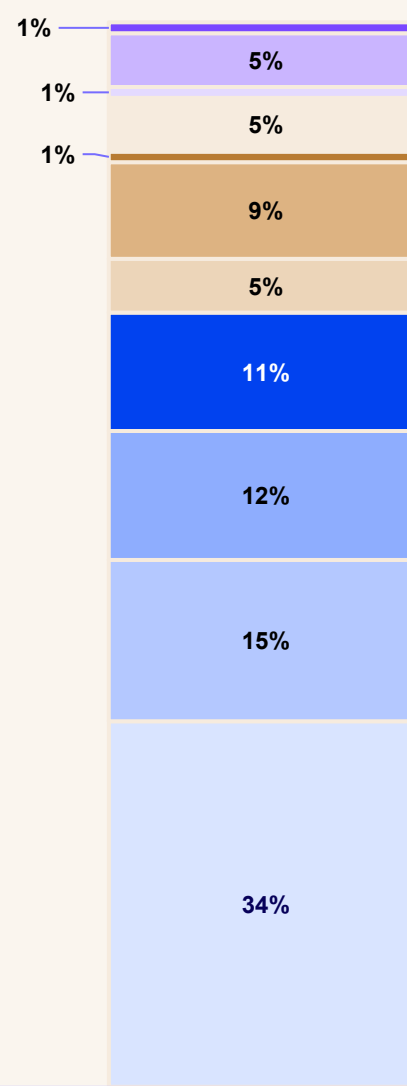
Current Finance Role



UK
n=500



US
n=500



Canada
n=350

- Accounting / audit
- Retail / commercial banking (e.g., branch banking, business banking, lending)
- Investment banking (e.g., M&A, capital markets, underwriting)
- Asset management / institutional investing (e.g., portfolio management, research)
- Wealth management
- Corporate finance (within a corporation)
- Trading / markets (e.g., sales & trading, market making, electronic trading)
- Risk management (e.g., credit risk, market risk, operational risk)
- Compliance / regulation / legal within financial services
- Fintech / digital finance / payments within financial services
- Insurance / actuarial