

Fall
2015

Fordham KPMG Intern Guide

TIPS FOR SUCCESS DURING YOUR SEMESTER ABROAD

KPMG UK LLP



FORDHAM UNIVERSITY
THE JESUIT UNIVERSITY OF NEW YORK

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Congratulations!

Great job on securing an internship at the highly prestigious, global firm-- KPMG UK. You should be very proud and excited to take on such a challenging task. Living, working, and studying in a foreign country is a unique and extremely beneficial experience. We know this whole “study abroad thing” can seem a bit daunting, but this time will be one of the most rewarding and memory filled times of your life. Make every moment count!

To make the transition a little easier, this manual is designed to answer the smallest to largest questions you have about the internship and study abroad experience as a whole.

So, strap in and get ready to make your trip across the pond something you will never forget!

-Your Fellow Fordham KPMG Interns

Applying for a Tier 4 (General) Student Visa

In order to work in the UK during your time abroad, you must apply for a Tier 4 (general) student visa. To do this, follow the link below.

<https://www.gov.uk/apply-uk-visa>

To apply:

1. Follow the link above to fill out the online application for a Tier 4 (General) student visa
 - a. Keep in mind that applying is about \$400-\$500
 - b. When filling out the online application, they will ask you for your CAS number. This number comes from Graham Bolton at Fordham University London Centre. Email him at gbolton@fordham.edu informing him that you are filling out a visa application as a future KPMG intern.
2. Schedule an appointment to get your biometrics taken at a New York office ASAP (office options will be provided to you when scheduling an appointment)
3. Once your biometrics are taken, follow the directions they give to you at the office very carefully—you will have to send you passport along with some paperwork filled out at the biometrics appointment to a specific address (if you leave any information out it will delay processing time). Mailing this information is your responsibility!
4. WAIT—you will receive an email when your application has been received. It will then give you an estimated time in which you should have your passport/visa back.
 - a. You might consider getting an expedite service for the approval of your student visa. This costs an extra \$170 or so, but might be worth it if the process time is beyond the date of your flight to the UK. Remember that when you apply for the visa, you will have to send in your passport. Thus, you cannot leave the country until you have your visa and passport back. Dean Polito has a contact that can speed the application with this fee.

Applying for a visa as soon as you commit to the internship is extremely important. This whole process takes quite a bit of time. So, the sooner the better. If you do not have a visa, you cannot work in the UK. If you do not have your passport, you cannot leave the US.

During your European travels, UK customs officers will check your visa each time you enter back into the UK. You will most likely have to answer a few questions and get your fingerprints taken each time. By getting the Visa, you won't need to carry around the documents that your friends who are not interning have to carry. The Visa is sufficient.

Banking

In order to receive direct deposit pay checks from KPMG, you must set up a UK bank account and forward the account details to Human Resources at KPMG (they will send you forms to complete via email.) The easiest bank to register with is Lloyds of London. There is a branch directly across the street from Fordham University London Centre.

Lloyds of London- Kensington High Street
112 Kensington High Street
London, W8 4SN

How to set up an account

- 1) Drop by or call to book an appointment at Lloyds of London and tell them you would like to open up an account
- 2) Make sure to bring with you to the meeting
 - a. Your passport
 - b. Your paperwork with you CAS reference number on it
 - c. Your US drivers licence/ID card

*It is important to give the bank a UK mailing address. This is the address in which Lloyds will send important information such as your debit card. Use the Fordham University London Centre mailing address:

Fordham University London Centre
Attn: YOUR NAME
23 Kensington Square
London, UK W8 5HQ

*Make sure to set up a bank account as soon as possible (first few days in London). After Human Resources has your bank account information you will begin to receive payments about once a week.

Your bank account at the end of the semester

- 1) Option 1 is to keep the account open. You never know when you will be back!
- 2) Option 2 close the account and transfer money to another account (either physically or through the bank). Be aware of the date you close the account because you still want to get paid for your last week at KPMG!

**Of note: there is no need to worry about paying taxes here in the UK. You are not in the UK long enough and do not make enough money.

Transportation

You will constantly be travelling from Point A to Point B and in this section we outline some important transportation tips.

Citymapper is a helpful app to download because you can simply plug in whatever address you would like to go to and the best public transportation route is displayed. It also automatically changes when you go to a different country so that it could be used in areas outside London. Googlemaps is also useful.

18+ Photo Oyster Card

Depending on your class, work and social schedule, it will most likely be cost effective to purchase an 18+ Oyster photocard (London equivalent to a MetroCard.) The student Oyster card grants you 30% off of weekly or monthly passes for the Oyster card. Follow the link below to make an account and apply for a student Oyster card. The process will also require some university documentation.

<https://photocard.tfl.gov.uk/tfl/showLogon.do>

*London's tube map is split into different "zones." There is no flat fee for travelling on the tube—it depends on which zone you are travelling to. Most likely, purchasing an unlimited pass for zones 1 and 2 will get you around all of the major places in London (school, work, major tourist spots for about £87 per month)

Link to a Tube Map:

<http://www.tfl.gov.uk/cdn/static/cms/documents/standard-tube-map.pdf>

Getting to Work

KPMG Address:
15 Canada Square
London E14 5GL

From Fordham University London Centre to KPMG (45 min – 60 min)

1. Walk to High Street Kensington Station
2. Take the **Eastbound Circle line** train to **Westminster**
3. At Westminster, change to the **Eastbound Jubilee line** train and get off at **Canary Wharf**

**You do not have to exit the station to get to the KPMG offices. Exit underneath the sign that reads “Canada Square Offices and Shops” and take the escalator up. Follow the hallway all the way down, until you see the KPMG offices on the right.

From KPMG to Fordham University London Centre (45 min – 60 min)

1. Walk downstairs and take the **Westbound Jubilee line** train to Westminster
2. At Westminster, Change to the **Westbound Circle line** train.
3. Get off at High Street Kensington station.

No matter where you are coming from, just remember that Canary Wharf (KPMG office) are on the **JUBILEE LINE**. There really isn't another way to get to the office.

Mobile Phone

There are a couple ways to gain access to cell service during your time in London.

1. Buy and international plan while in the United States. (Pretty costly)
2. Unlock your US cell phone and buy a SIM card when you get to London (recommended)
 - a. giffgaff.com and three.co.uk are two recommended providers
 - b. “3” stores are physical locations while giffgaff is online. Thus you must either visit a store or website to purchase a SIM card. You then “top up” (add value/money) to the SIM card with money and/or purchase a monthly plan.

*There are no contracts-- it is quite simple

*Keep in mind that iMessage/FaceTime, Whatsapp, Viber etc. only use the internet. You might consider just buying a data plan.

*This method will only work if your phone is unlocked! (All iPhone generations from 5s on are already unlocked).

Introduction to KPMG UK

Hours

The guideline for the number of hours in the past has been 13-15 per week. Depending on your schedule this can be done in two or three days per week. Your schedule will rely on the class schedule Graham creates which happens just a few days before the trip starts. It is best to create a consistent schedule. This will allow everyone in the office to appropriately plan out when they can rely on you to complete projects. Of note, the maximum is 20 hours a week and you should avoid falling below 12 hours. However, there were weeks where the Gabelli London program schedules trips which take precedent over KPMG. Once these dates are released notify Jon and whoever you may be working directly with at that time. Please note the trips that you plan should not take away from your hours at KPMG. The hierarchy of your semester would be: Class, Gabelli London Events, KPMG, and then Personal Travel/Activities.

In order to get paid you will need to fill out two timesheets on a weekly basis. First, fill out your “iTime” timesheet. Your code will be “Work Experience” and then you will insert the appropriate works hours and breaks. Then fill out your SAP timesheet where your code will be Administrative (AA). Jon can help you figure this out the first time you do it as it is a bit tricky. After filling out the timesheets they will be sent to Jon for approval and when he approves them you will be sent an email.

** Of note, if the month ends in the middle of the week you will need to fill out two “iTime” timesheets.

Dress code

Men: Smart Casual is the dress code, but be aware it is a bit different in the UK. On most days the guys wear suits, but without the tie. Bring at least 2 suits with you to alternate. It is also acceptable to wear just a dress shirt without the jacket, or a sweater with the dress shirt underneath. For shoes, at least one pair should be black.

Women: Again, the dress code is smart casual. Look professional and put together. A suit is not necessary each day, however, skirts, blouses, sweaters, etc. are.

On the first day, come “suited and booted.”

It is best to always have a jacket/blazer and tie with you as they will be required in the event that Chris invites you to a client meeting or to certain events. They don’t need to be always worn, but having them is key. You do get a locker to store any items you need.

Making the Most of Your Time at KPMG

You are given the opportunity to work at a global, prestigious firm at such an early stage of your life—take advantage of it! Via your KPMG email, you will receive firm-wide emails and be invited to company events. Read the emails. Go to the events. In addition, ask Chris Hogan if you would be able to take a look at his calendar and tag along to client meetings and other senior level engagements. Immerse yourself as much as possible in the culture of KPMG both inside and outside the office.

KPMG Lingo

Atlas- KPMG's mandatory tax compliance tracking system, used for all tax compliance engagements. It tracks the steps of the tax return process, monitors the due dates encountered in the annual tax return cycle and provides due date and management reports.

***A great resource to use when finding a client's tax details and personal information.

Orion- the Tax practice's intranet-based document management system, enables tax professionals to electronically store, retrieve, and share documents.

***A great resource to use when looking for a client's prior year tax returns.

eRooms (KClient)- provides shared, secure workplaces on the Web for distributed project teams to do their work. eRoom enables your team to discuss ideas, share information, and make decisions, all within a central location. eRoom also offers built-in enterprise content management, thus enabling the integration of content and collaboration in your work process.

***Used to upload documents the whole team needs.

Tips-

- Make sure to ask for access to kclient, Atlas, and Orion as soon as possible. A majority of the work you do at KPMG will involve these proprietary systems.
- Brush up on your Microsoft Outlook knowledge. You will use Outlook to communicate with colleagues and will be expected to keep your Outlook Calendar up to date so the rest of the office.
- Think back to everything you learned in Information Systems 1 regarding Microsoft Excel. It will all be useful in your time here.
- Day to day productiveness is important. You were hired with the expectation to give your best effort 100 percent of the time. Some of your work is sent out to clients or government agencies so accuracy is vital. Always take the time to double, if not triple check everything you complete.

Student Life

Travel

Booking: Wait to book all of your trips until you get to the UK and meet some people on the trip. You will want to travel together. To book flights two of the better options are Skyscanner and Kayak. As for where to stay overnight, Airbnb and hostels have been the best option. Airbnb's offer more privacy, while hostels offer the classic backpacker/tourist experience. In addition to planning trips a few weeks in advance, try to book flights on either Sundays or Tuesdays as these days typically have the lowest rates.

Locations: Europe is at your fingertips. London is an incredible jumping off point. Some past destinations for Fordham students, Edinburgh, Brussels, Paris, Amsterdam, Copenhagen, Lisbon, Madrid, Barcelona, Morocco, Berlin, Prague, Budapest, Vienna, Geneva and the school organizes a trip to Rome.

**Take time to enjoy London and the UK. Many students' biggest regret is not spending enough time here. There are many great towns to visit throughout the UK and doing so will give you a perspective on the UK that extends beyond your London experience.

Balancing It All

Balancing work, school, living in a foreign country, and European travel will absolutely be stressful. You will most likely have to sacrifice some of your social life and a few well-rested nights in order to have a successful balance. Just remember, work and school come first. You were given this once in a lifetime opportunity and are being held accountable for the responsibility you took on. It's a challenge, but you were chosen because you are completely capable of taking it head on.

With that being said, ENJOY YOURSELF! You will most likely never have the opportunity to live, work, study, and travel around Europe for 5 months with a large group of friends again.

Tips-

- Time Management- use your Outlook and personal calendar to schedule out times to finish school work and KPMG work. Once you get your syllabi put all assignments into your calendar. Things will get hectic as the semester progresses and professors are not always the best with communication regarding assignment deadlines.
- Understand there is a tradeoff (class vs work vs social)
- Be proactive. Schedule out plane tickets and days you are going to go into work against your school schedule. It is very possible to see lots of Europe, get good grades, and contribute excellent work at KPMG.

Contacts

Still have questions? Below is a list of contacts of people that would be more than willing to help with lingering questions you might still have. Study abroad in London and working at KPMG is an amazing experience that will introduce you to so many different experiences. It is most definitely a lot to take on, but you were chosen because you can do it! Enjoy your time here and make the most of it. It goes by quickly!

KPMG UK Connections

Chris Hogan – Partner Global Mobility Services, Tax – Chris.Hogan@KPMG.co.uk

- Fordham Alum

Jon Nolan – Client Account Executive, Tax – Jon.Nolan@KPMG.co.uk

Carole Roney – Administrator, Tax – Carole.Roney@KPMG.co.uk

KPMG USA – Fordham Connections

Claire DiCiuccio – Interned 2015 – cdiciuccio@fordham.edu

Andrew Freire – Interned 2015 – afreire2@fordham.edu

Ryan Marquis – Interned 2015 – rmarquis@fordham.edu

Troy D’Amico – Interned 2014 – tdamico1@fordham.edu

Christian Trigani – Interned 2014 – ctrigani1@fordham.edu

Matthew (Matt) Calabrese – Interned 2013 – mcalabrese3@fordham.edu

Marisa DiRocco – Fordham Campus Recruiter – mdirocco@kpmg.com

Next Steps

This experience can be leveraged for further opportunities with KPMG. Marisa DiRocco will be your main point of contact if you wish to pursue a leadership program or internship with KPMG. Be sure to reach out to her before you leave for London regardless of your level of interest in KPMG. She will provide an in depth overview of opportunities and their deadlines at the firm.

Some important deadlines:

Advisory summer leadership programs: Designed for students between sophomore year and junior year pursuing a 4 year degree. Application closes March of sophomore year.

Audit/Tax summer leadership programs: Designed for students between junior year and senior year who are pursuing a 5 year degree(s)/CPA. Application closes in March of junior year.

Advisory summer internship program: Designed for students between junior and senior year pursuing a 4 year degree. Application closes in September of junior year.

Audit/Tax summer internship program: Designed for students between senior year and year 5 pursuing a CPA. Application closes in September of senior year.

Now, it's up to you. Our intent is to pass this guide on to each semester of KPMG interns in London. After you are done with your semester abroad, please revise and update this guide with whatever you think would be useful for the succeeding interns and pass it on to your manager at KPMG UK.

Good Luck and Have Fun! It will be a whirlwind of a semester and by the end, you'll be exhausted and wishing the time didn't go by so quickly.

-Your Fellow Fordham KPMG Interns