

Name
Address
Phone| Email

EDUCATION

College

Location

Bachelor of Arts in Economics and Commerce

Minors: Leadership and National Security, Rhetoric

Expected May 2014

- **Cumulative GPA:** 3.2 / 4.0 **Major GPA:** 3.4/4.0
- **Honors:** Memorial Scholar, XX Scholar, Omicron Delta Kappa Leadership Honors Society, Dean's List
- **Relevant Coursework:** Corporate Finance, Investment Banking, Managerial Accounting, Financial Accounting, Macroeconomics, Managerial Economics, Money and Banking, Statistics, Nature of Business, Microeconomics, Economics, Business Calculus, Rhetoric, Spanish

WORK & LEADERSHIP EXPERIENCE

Capital Partners

Location

Financial Analyst, Private Equity and Investment Banking

May 2013 – August 2013

- Assisted in creation of key materials in transactions including: (i) Executive teaser summary (ii) Strategic and Financial target acquirer list for clients (iii) Confidential Informational Memorandum and (iv) Financial package
- Analyzed acquisition targets' financials to determine health of company, form preliminary valuation and make buy/pass recommendation to Managing Directors
- Conducted in-depth research on potential clients' markets, potential seed funding and current portfolio industries

Selected Transaction Experience

- **Project Alpha**-Lead analyst on sale advisory of tech-enabled service company. Worked with team from pre-market until market on project. Conducted initial due diligence on client and assisted in creation of two page executive summary. Created the target list and lead initial buyer contact for client resulting in 46-signed CA's from personal calls. Built 50-page CIM with associate in two weeks time on very obscure service company with no direct comparable.
- **Project Beta**- Worked with team in support role during an exiting a portfolio investment from pre-market until initial offer letters in marketing process. Assisted in construction of marketing materials and created financial model of top 10 and bottom 10 weekly sales of Beta's chain stores. Allowed the firm to analyze trends and provided insight on why some stores boomed and others did not for potential acquirers. Worked with the firm to build current industry section for CIM.

Investment Banking Group

Location

Financial Analyst, Investment Banking

December 2012– January 2013

- Responsibilities included: financial statement analysis, preliminary valuation analysis, identification of prospective strategic and financial acquirers, assisting with the creation of sell-side presentation materials for client pitches
- Assisted in due diligence for in broker/dealer agreements and completed Anti-Money-Laundering checks
- Worked along side team to conduct full-time analyst recruiting efforts

Student Body President

Location

Head of Student Body Government

April 2013 – Current

- Serve as liaison between the student body and the president of the college and board of trustees
- Review all alleged honor code infractions and decide whether or not it warrants an honor court trial
- Represent the student body in ever facet of campus life to ensure student approval and ultimately retention

Fund, Student Lead Investment Fund

Location

Portfolio Manager

April 2013– Current

- Supervise a portfolio with \$70,000 of the college's endowment fund
- Analyze different potential investment opportunities using various valuation methods including DCF and comparable company analysis
- Communicate with a team including four other managers and analysts to make purchases and sales of stock
- Write detailed reports of each trade with financial analysis support to present to the board of trustees of the college

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: MS Office, Capital IQ

Activities: Varsity Soccer, Varsity Swimming, Leadership Society of X Pre-Business Society, Finance Board, Sigma Alpha Epsilon fraternity treasurer