

Name

Address

Phone | email

EDUCATION

Non-Target

City, State

Bachelor of Science in Finance

May 2013

- **GPA:** 3.5 / 4.0; GMAT:
- **Honors:** Recipient of Top 25 under 25 undergraduate business student designation
- **Relevant Coursework:** Applied Securities Analysis, Financial Statement Analysis, Principles of Investments, Financial Policies and Strategies, Financial Institutions & Markets, Financial Accounting

WORK & LEADERSHIP EXPERIENCE

University

City, State

Equity Research Analyst, Student Managed Investment Fund

August 2012 – May 2013

- One of 10 students selected to actively manage a \$260,000 equity portfolio using fundamental analysis and modeling techniques (e.g., DCF, multiples based, precedent transaction); research resulted in the purchase of two equity securities.
- Project Experience:
 - Portfolio's \$24,000 acquisition of two stocks: debt management firm, credit processing firm
 - Evaluated growth prospects, pricing, and financial ratios to select two investments out of 5-7 potential options; 700M and 112B market cap companies selected after analysis.
 - Finalist; 2013 CFA Research Challenge
 - Analyzed a web processing company and issued a sell rating based on future growth expectations and intrinsic value derived from DCF and precedent transaction analysis
 - Metropolitan Ministries Investment Policy Statement
 - Led a team to write an investment policy for the establishment of a \$20M Endowment.

Leading defense contractor

City, State

Financial Analyst Intern, Special Operation

August 2012 – May 2013

- Completed special projects under the guidance of the director of the business office in order to increase efficiency, analyze and quickly identify overspending, and effectively forecast future financial data.
- Created a detailed excel model to forecast over \$30M in fringe benefits spending broken down among all active contracts on a per employee basis.
- Monitored revenue and cost data on a per contract basis in order to forecast future earnings numbers.

Non-Finance Related Club

City, State

Vice President

April 2012 – May 2013

- Organized bi-weekly meetings and scheduled speakers to educate students in career opportunities
- Recruited 66 new members over the first year of being an operational student organization

SKILLS, ACTIVITIES & INTERESTS

Activities: Student Finance Association, International Business Board, Big Brothers Big Sisters

Interests: Fundamental equity research, tennis, backpacking, travel, international relations