

JOHN DOE

JD@gmail.com ♦ 908-255 ♦ NJ

EDUCATION

Lee University

John Doe's Business School

Graduated: May 2023

GPA: 3.3

B.S. Business Administration Finance and Real Estate Dual Major Degree

- **Awards & Honors:** Athlete Academic Honors List, Dean's List 2020, Academic Scholarship recipient
- **Extracurricular Activities:** Division 1 NCAA football player, Economics and Finance Club
- **Relevant Coursework:** Information Technology for Business (Teaching Assistant), Investment Risk Management, Quantitative Analysis Business, Principles of Accounting, Business Statistics, Bond Markets

PROFESSIONAL EXPERIENCE

John's Commercial Real Estate Services

John town, NJ

Investments Sales - Associate

August 2022 – Present

- Involved in all aspects of CRE transactions including trend analysis, modeling, and due diligence
- Responsible for identifying client needs and communicating value-driven solutions to management
- **Selected Transaction Experience**
 - Conducted thorough valuations of business entities and commercial real estate, identifying a key investment opportunity valued at over \$3mm, that facilitated the development of key partnerships
 - Analyzed and structured a 1031 like-kind exchange deal involving multiple properties and coordinated with tax professions to certify the requirements to defer taxable gains and mitigate profit losses
 - Composed Excel proforma to forecast financial trajectory of \$12mm investment property, integrating cash flow and sensitivity analysis to inform loan structuring and investment decisions
 - Negotiated a strategic acquisition of medical space for a prominent healthcare provider, contributing to a notable 25% expansion in patient occupancy and secure favorable terms for their operational growth

Corporate Intern

May 2022 – August 2022

- Provided market analysis and local area real estate trends to Senior Vice President, using CoStar
- Assisted in closing over \$5mm of commercial property sales for close investors

True & Associates

John town, NJ

Consulting Intern

May 2021 – August 2021

- Examined commercial insurance coverage plans and provided research assessment to senior consultants
- Actively coordinated with producers to maintain and expand clientele base in upwards of 30 businesses

Johns Roofing

John town, NJ

Project Manager

May 2020 – January 2021

- Managed job site and office operations for installation and maintenance of commercial roofs across the tri-state region of New Jersey, New York, and Pennsylvania while meeting deadlines
- Consolidated the firm's financial records into MS Access as reference data, enabling streamlined data retrieval

PROFESSIONAL CERTIFICATES

Programming for Everybody, Getting Started with Python University of Michigan (2023) *online course*

Business Analytics with Excel Johns Hopkins University (2024) *online course*

PROJECTS

CLO University Final Project

- Delivered a detailed presentation on the intricacies of CLO's, evaluating their composition, potential risks, and effects on the investment sector, resulting in a deepened understanding of fixed income instruments

Python Trading Software

- Developed a Python based trading algorithm to identify undervalued stocks using key financial indicators such as RSI levels and P/E ratios, with integration of analysis results into Excel for investment decision making
- Managed self-made investment portfolio which consistently outperformed S&P 500 while maintaining a high Treynor Ratio that offered a diversified portfolio to mitigate risk of high Beta asset classes

FX GBP Project

- Imported data into Excel to identify trends between British oil production, futures, and derivatives to the value of the GBP, resulting in the identification of a significant correlation between production levels and GBP worth

Real Estate Investment Analysis Project

- Synthesized comprehensive financial models to evaluate real estate investments, focusing on EGI, required IRR, and leveraged cash flow, culminating in a detailed projection of five-year profitability using Excel

Employee Productivity Power BI Project

- Utilized Power BI to create visual trend analysis of roofing employee's productivity
- Presented revenue and non-billable KPIs to business owner to make evidenced business decisions

SKILLS

Proficient in Microsoft Office, Outlook, Python, SQL, PowerBI, Bloomberg Terminal Certified