

Name Lastname, CFA

(312) 111 0000 ▪ xwy@gmail.com ▪ Chicago, IL

QUALIFICATIONS

- 5+ years of experience in commercial lending, business valuation, and corporate finance
- Bilingual MBA, CFA charterholder with working experience in the US and Latin America

PROFESSIONAL EXPERIENCE:

Independent Consulting

Latin America

Corporate Finance/Business Consultant

10/2011 - Present

- **Performed commercial and financial due diligence**, and **financial modeling** for **project finance** and new business opportunities purposes.
- **Analyzed new business opportunities, led negotiations** to acquire distribution rights of new brands, **coordinated** efforts of team members, and assisted management in developing new ideas to promote sales of underperforming brands.
 - *Constructed financial model successfully used to demonstrate the financial viability of an ethanol and sugar plant with projected sales of \$100MM+, seeking \$35MM in additional financing to fund working capital needs.*
 - *Performed cash flow projection modeling to assess financial feasibility of new business unit in the durable goods wholesaling industry with projected sales of \$10MM+.*
 - *Effectively acquired distribution rights for 2 new brands, and assisted in the inclusion of 2 additional brands to the portfolio of Chile's largest retailer/wholesaler of appliances and durable goods.*

Small Valuation Firm

Chicago, IL

Associate - Business Enterprise Valuation

2007 - 09/2011

- **Prepared valuation reports** from start to finish, including management interviews, in-depth **industry, market, and competitor research**, and **valuation analysis**.
- **Developed and maintained valuation models**, such as **discounted cash flow (DCF)**, **market multiple**, **market transaction**, and intangible asset models.
 - *Participated in over 50 valuation assignments for companies in the lower-middle market, with revenues ranging from \$5MM to \$500MM, in a wide variety of industries.*
 - *Improved proprietary valuation model to include methodology used to value international companies (international cost of capital), and to include alternative cost of capital estimation methods.*
 - *Took additional responsibilities assisting managing directors in reviewing reports from other associates and improving the report's overall presentation.*

Latin American Bank

Latin America

Commercial Banking Credit Officer

2003-2005

- **Managed a commercial loan portfolio** focus on the largest 5% of the corporate clients with actual or potential financial problems, through a variety of industries.
- Conducted **credit/underwriting analysis**, performed financial pro-forma and **risk assessments**, performed site visits, interviewed management, **negotiated** new loan terms, prepared, proposed and defended transaction proposals in credit committees.
 - *Successfully reduced non-performing loans ratio from 14% to 9%, outperforming the domestic banking system average (team achievement).*
 - *Participated on the successful loan restructuring of the second largest commercial loan under supervision.*

EDUCATION & CREDENTIALS:

CFA charterholder - CFA Institute, 2012

Master of Business Administration - Finance, 2007

Non-Target University, Chicago, IL

Business Honor Society - G.P.A.: 3.97

Bachelor of Science in Economics, 2002

Non-Target University, Latin America

Graduated with Honors

SKILLS

- In-depth understanding of valuation methodologies
- Strong analytical and financial modeling skills
- Fluent in English and Spanish, conversational German
- Effective communication and negotiation skills
- Ability to multi-task and work with teams