

Name

Address

(999) 999-9999 | Email@Gmail.com

EDUCATION

Semi-Target

Candidate for Bachelor of Science in Economics & Finance
GPA 3.3 | 4.0

City, State

Expected May 2015

WORK EXPERIENCE

Keefe, Bruyette & Woods

Equity Research Summer Analyst

City, State

June – Aug. 2013

- Initiated coverage directly under Senior Analyst supporting North East regional bank sector
- Responsibilities included researching financial and industry-specific news, analyzing financial statements, compiling and revising financial models, market data and extraordinary line items for earnings and initiating coverage
- Initiated coverage on a \$300 million regional bank for Senior Analyst; 28 page research report highlighted growth prospects, industry analysis & risks associated with potential investment as well as valuation and Market Perform rating
- Crafted earnings, comparative and precedent transaction models to value target company resulting in a \$40 price target
- Updated various models with relevant information following earnings press releases and drafted various earnings notes
- Backfilled analyst's financial models with historical data utilizing information from 10Q, 10K, Bloomberg & SNL Financial
- Created efficient and easy-to-follow spreadsheet to track former CEO's equity portfolio performance

Middle Market Investment Bank

Investment Banking Spring Analyst

City, State

Jan. - May 2013

- Prepared an equity report on a \$3.7 billion packaging company interested in acquiring a client; briefed managing director on company background, earnings history, management, recent news and possible synergies arising from acquisition process
- Utilized discounted cash flow (DCF), comparable companies analysis and precedent transaction analysis to value various private companies in the \$40-\$100 million range for M&A and recapitalization decisions
- Categorized over 6,500 contacts into various industries in order to update contact database; implementation led to increased efficiency in notifying capital sources and buy-side investment bankers of potential acquisition candidates
- Created various industry, micro and macro-economic reports utilized in pitches to provide potential acquirer with a background of the industry, recent news, recent transactions, a list of competitors and industry leaders
- Received a return offer for Summer & Fall

Boutique Equity Research Firm

Equity Research Spring Analyst

City, State

Jan. - May 2013

- Initiated coverage on a \$1 billion undervalued consumer goods company; due-diligence and DCF valuation resulted in 51% potential upside; security has appreciated 67% since initiation report
- Forecasted company's balance sheet, income and cash flow statement's line items by 5 years utilizing a 25% growth rate, 10% tax rate provided by management, terminal multiple of 10x from a comparable analysis and WACC of 11.1% provided by Bloomberg to determine free cash flow; resulted in a \$65.35 price target, in-line with Wall Street analyst's estimates
- Sourced information on company's industry, products, competitors and financials from the 10K, 10Q, and Bloomberg
- Report was featured on company's website and sent to various buy-side money managers interested in growth plays

OTHER ACTIVITIES

X University Investment Group

Energy Group Investment Analyst

City, State

Sept. 2012 - Present

- Presented a \$10B Brazilian energy company to investment committee following a comparative valuation analysis indicating an undervaluation of 49%; security has appreciated by double-digits since investment recommendation
- Applied DCF, net asset value and comparative companies analysis to value the target company following screening process involving enterprise value, EBITDA, price/earnings, price/book ratios, EPS growth estimates and business model analysis
- Met weekly with investment team to discuss potential investments to add to xx's \$700,000 equity portfolio

Small School Business

Founder

City, State

Sept. 2011 - May 2012

- Successfully built and grew a profitable business cleaning suites and townhouses on the xx campus involving 21 clients and received recognition and approval from the Dean of Student Affairs to market service on campus
- Executed plan for expansion to townhouses increasing monthly revenues by 200% and client base by 150%

ADDITIONAL INFORMATION

Technical Skills: Bloomberg Certified in Equities & Fixed Income, FactSet, Cap IQ, Wall Street Valuation Course

Activities: Personal Investing, Seeking Alpha Author, Relay for Life, Campus Newspaper Editor

Interests: Professional Pyrotechnics (ATF License Holder), Enduro Dirt Biking, Ice Hockey, Skiing, Golf, Traveling, Drums