

First Last

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EDUCATION

Barely Semi-Target - Business School

B.S. in Business Administration & Economics; Concentration in Finance

City, MA

Anticipated 2026

- **Cumulative GPA:** 3.90/4.00 | **Honors:** Omicron Delta Epsilon, Dean's List All Semesters
- **Relevant Coursework:** Financial & Managerial Accounting, Investments, Business Statistics, International Business

WORK EXPERIENCE

LLM Tech bank (4 MD's, 25 Employees, 70 Transactions in 4 years)

Incoming Investment Banking Analyst Summer/Fall Intern

San Francisco, CA

Jul. 2025

LMM Tech Bank (2 MD's, 30+ Unpaid Interns, 90 transactions in 4 years)

Investment Banking Analyst Intern

New York, NY

Jul. 2024 – May 2025

Broker-Dealer affiliation: (Insert Reputable BD Here, Necessary item for last line)

- Led recruitment efforts by conducting 100+ interviews and refining candidate quality through selective criteria
- Participated in nine deals ranging from divestitures, M&A transactions, and debt & equity raises

Select Transaction Experience:

- *Sell-side M&A transaction for \$4.1M ARR AI-powered Fleet Management SaaS Platform (Banked, Ongoing)*
 - Drafted full CIM including company overview, product descriptions, GTM strategy, key customer use cases, and financials; highlighted 25% YoY ARR growth and \$19.5M active sales pipeline
 - Analyzed customer cohorts by logo vintage to assess ARR retention, expansion, and concentration; forecasted new logo growth using pipeline data, ACV assumptions, and close rate analysis to support forward revenue build
 - Mapped buyer universe of 400+ strategic and financial acquirers with tailored rationale for each; prioritized outreach based on past transaction activity, market adjacency, and integration fit
 - Built fully integrated 3-statement model including ARR-based revenue build, headcount-driven OpEx forecast, cash runway analysis, and high-level deferred revenue treatment for SaaS billings recognition
- *Series A Capital Raise for \$20M ARR Workplace Management SaaS Platform (Banked, Closed)*
 - Supported \$13M equity raise at a \$37M pre-money valuation to fund GTM expansion, global adoption, and enhancement of the company's unified no-code platform
 - Managed 13 analysts to prepare CIM and investor pipeline materials; positioned platform's growth strategy, recurring revenue model, and market opportunity to appeal to institutional SaaS investors
 - Drafted company overview, industry landscape, and competitive benchmarking in CIM; aligned messaging with investor focus on scalability, product differentiation, and sales efficiency
 - Identified and prioritized 50+ venture and growth equity investors based on stage fit, prior portfolio composition, and investment theses; supported outreach coordination and initial investor Q&A
- *Sell-side M&A Transaction for \$15M ARR eCommerce Financial Intelligence Platform (Terminated)*
 - Cooperated with 3 analysts to build teaser, executive summary and key investment highlights on CIM and buyer list to support the divestiture of up to 100% of the Company as part of Founders' succession planning
 - Compared financial intelligence and 4 other SaaS verticals, mapping out 150+ financial and strategic acquirers

Broker-Dealer (MD wanted to start a similar internship program)

Investment Banking Program Coordinator

New York, NY

Nov. 2024 – Feb. 2025

- Spearheaded development of a comprehensive internship program from the ground up, utilizing investment banking experience to design training modules and mentorship structures, hired 5 interns
- Recreated investor presentation in Microsoft PPT for a \$200M SPAC underwriting proposal to ensure alignment with firm-specific presentation standards

ADDITIONAL INFORMATION

Skills: Proficient in Microsoft Office Suite, Crunchbase, HubSpot, PitchBook, ZoomInfo

Certifications: Wall Street Prep (DCF, Financial Statement, M&A, Trading Comps, and LBO Modeling)

Interests: Golf, Marathon Running, Economic Philosophy, Traveling (35+ Countries)