

# NAME

Address • Cell • Email

## PROFESSIONAL EXPERIENCE

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### ABC Company

Trading Analyst

XXX, XX

May 2013 – Present

- Worked on trading desk for XXX team, overlooking \$140M in assets under management through discretionary wealth management and use of proprietary investment strategy processes
- Administered individual and bulk trading of high-yield stocks, bonds and ETFs held in client portfolios in order to rebalance accounts or change asset allocation to meet desired investment goals and risk profile
- Improved security selection process by consolidating existing procedures and introducing new fundamental and technical analysis strategies and research sources
- Led in the creation and maintenance of marketable material and presentations for new and existing high-net-worth individuals, institutional endowment funds and foundations as well as defined benefit and contribution plans

### ABCD Company

M&A Analyst, Intern

XXX, XX

January 2013 – March 2013

- Worked for M&A advisory division of established corporate finance institution specializing in capital raising, business disposals, mergers and acquisitions and business valuations
- Staffed on buy and sell-side M&A advisory transactions in the agricultural equipment, textile and food production industries; built and modified an extensive variety of financial models, including: accretion/dilution, discounted cash flow, leveraged buyout, comparable public company and precedent transactions
- **Selected transaction experience:**
  - Potential \$50M buy-side acquisition for large-cap agricultural equipment manufacturer
    - Created full scale operating model for acquiring company complete with income statement, cash flow statement, balance sheet, and supporting schedules
    - Valued entity using company comparables and discounted cash flow; analysis results showed company was overvalued given LTM EV/EBITDA of 8.5-11x indicating stock-based acquisition was most viable option
    - Researched technology and communications industry to source four potential small-cap acquisitions; presented list to senior management, leading to further due diligence on one specific target
  - Ongoing restructuring advisory for distressed \$42M Brazilian textile company
    - Analyzed effects of several restructuring alternatives and various recapitalization scenarios; further evaluation resulted in decision to pursue sale of the company to potential Latin American firms
  - Potential sell-side M&A advisory for \$318M South American agricultural company
    - Constructed three statement model and assisted Associate in creating pitch book for presentation to client
    - Conducted due diligence on industry and competitors and researched potential acquirers upon client's request

### ABCDE Company

Customer Service Pro

XXX, XX

July 2007 – January 2013

- Worked for XXX by membership with total assets under administration of CAD \$14.6 billion
- Generated over CAD \$2.2 million in new business through products including new mortgages, lines of credit and other banking services, accounting for 4% of total retail loan portfolio growth
- Exceeded branch sales and referral targets by 137% in 2012; effectively recognized and satisfied each client's needs through unparalleled customer service and product knowledge

## EDUCATION

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### University of XXX, XXX School of Business

Bachelor of Commerce, Finance – GPA X.XX

XXX,XX

May 2013

- **Relevant Coursework:** International Financial Markets and Institutions (XX%); Applied Financial Markets (XX%)

### XXX

International Exchange Program

XXX,XX

January 2011 – June 2011

- **Relevant Coursework:** Hedge Funds (Risks, Strategies, Structure); Financial Systems: Crises & Theories

## SKILLS, CERTIFICATIONS & INTERESTS

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- **Language Skills:** Fluent Speaker of XXX; Basic Proficiency in XXX
- **Technical Skills:** Bloomberg; Capital IQ; Thomson ONE; Market-Q; SEDAR; EDGAR
- **Certifications & Training:** 2013 CFA Level I Candidate; Breaking into Wall Street Financial Modeling Course
- **Interests:** Innovative Technology; Traveling; Soccer; Financial Planning; Day Trading