

SteveDo

1930 ABC Road, ABC, AB 08110
123-456-7890 (C) | steve@yahoo.com

Education

Non-target University

Master of Science, Finance, Investment Management, GPA: 3.87

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December 2013

Non-target University

Bachelor of Science, Finance, GPA: 3.78, Magna Cum Laude
Beta Gamma Sigma International Honor Society
FMA National Honor Society

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May 2012

Work & Leadership Experience

ABC Capital Private Equity

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Analyst Intern

August 2013 - present

Work directly with the managing partner of ABC Capital, a venture capital and private equity firm. Source and analyze industries and businesses.

- Source deals through broker databases for potential targets that fit with preset investment criteria.
- Analyze up to three companies weekly to determine acquisition opportunities.
- Participate in weekly committee meetings to present investment opportunities and challenge other analysts' work.

CFA Institute Research Challenge 2013

Represented ABC University to compete in the final round of the XX region and won second place. Researched ABC, Inc. (NYSE: ABC). Collaborated with three team members to prepare an investment research report.

- In charge of researching industry overview, competitive positioning in a top-down analysis framework by utilizing the company's 10-K, 10-Q, research reports, and Bloomberg Terminal.
- Derived the target price of ABC by incorporating DCF model and relative valuation.
- Presented the analysis to the three-judge panel of experts from CFA Institute.

Lincoln Financial/ Lighthouse Planning Consultants

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Financial Advisor Assistant Intern

Spring 2012

- Maintained client databases, aggregated accounts and compiled performance reports.
- Utilized financial planning software such as CRM and eMoney.
- Designed, prepared, and developed deliverables for high net worth clients.

ABC University Investment Fund

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Lead Analyst

Spring 2012

Served as Consumer Cyclical lead analyst for ABC's \$100,000 portfolio. Monitored market trends, identified investment opportunities utilizing top-down and bottom-up approaches, and presented stock pitches in front of advisory board.

- Recommended a buy rating on Lowe's Companies Inc. (NYSE: LOW), based on the rebound expectation of the housing market, company's fundamentals, and comparable valuation.
- Recommended a buy rating on Magna International Inc. (NYSE: MGA), based on the soaring of the auto industry and undirected exposure to the Euro crisis.

Skills

- CFA Level II Candidate.
- Extensive experience with: Bloomberg Terminal, Capital IQ, CRM, and eMoney
- Advanced level of Microsoft Excel: modeling, formulas, functions, solver, and data analysis.
- Experienced in modeling and valuation methodologies: DCF and Comparable Companies.