

# Joe Schmo

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## EDUCATION

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### Non-Target, School of Business

*Candidate for Bachelor of Science in Business Administration*  
*Finance Concentration*

**Big City, XX**  
December 2015  
**GPA: 3.86**

- **Honors:** Dean's List (Fall 2011, 2012/ Spring 2012), Dean's (Merit) Scholarship
- **Relevant Coursework:** Corporate Finance, Financial Management, Macroeconomics, Microeconomics, Calculus, Statistics, Financial Accounting, Managerial Accounting, International Business, Computer Science

## WORK EXPERIENCE

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### Boutique Investment Bank

*Intern, Investment Banking Analyst*

**Big City, XX**  
July 2013 – Present

- Completed nine week investment banking summer internship culminating in an extension to return part-time for the fall
- Participate in the origination, analysis, and execution of a variety of sell-side merger and acquisition assignments for clients in various industries including the consumer products, transportation, and industrials sectors
- Perform comparable companies and precedent transaction analysis; research potential financial and strategic buyers
- Provide due diligence and spread financial information based upon materials received from the company
- Monitor middle-market M&A activity for relevant transactions to draft letters of interest to potential sell-side clients
- Create and update marketing materials regarding overall middle-market M&A activity for senior banker presentations
- Selected Transaction Experience:
  - Potential Sale of Private Consumer Plastics Manufacturer
    - Prepared key sections of client presentation detailing strategic alternatives for distressed business
  - Potential Sale of Private Logistics Company
    - Authored significant parts of pitchbook to client including comparable company and precedent transaction analysis and compiled industry analysis for the transportation/logistics sector

### Large Investment Management Firm

*Fixed Income Trade Support*

**Big City, XX**  
January 2013 – June 2013

- Provided analytic support for various fixed income portfolio managers to aid them in making investment decisions
- Examined securities on Bloomberg and formulated charts to deliver updated data for various portfolio managers
- Researched historical data to gather information on past performance of numerous fixed income portfolios
- Created organized workbooks for portfolio managers to extract statistics from to use in presentations
- Supplied daily updates regarding holdings to senior management at company's Canadian division

### Small Broker-Dealer

*Municipal Bond Trading Assistant*

**Hometown, XX**  
April 2012 – June 2012

- Gained exposure to the trading floor by working with 8 broker-dealers on a municipal bond desk
- Entered and updated municipal bond offerings from Bloomberg into Fabkom database to show current listings to clients
- Conversated with clients via telephone and entered bids on requested securities in efficient and timely manner
- Diagnosed problems on bond trades regarding price and amount and made changes based upon brokers' instructions

## LEADERSHIP EXPERIENCE

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### Consulting Case Competition Team

*Strategic Consultant*

**Big City, XX**  
September 2013- Present

- Nominated to compete on {Name} University's highly competitive and selective business case competition
- Analyze numerous complex strategy cases taking on the role of a consultant by offering recommendations and projections from a financial and strategic perspective to executives of the companies

### Alpha Alpha Alpha Literary Fraternity

*Vice President; Former Head of Recruitment, Philanthropy, Community Service*

**Big City, XX**  
September 2011 – Present

- Organized new member recruitment events and increased fraternity membership by 35%
- Directed charity run against child abuse and raised \$2000 dollars from community as contributions

## SKILLS, ACTIVITIES & INTERESTS

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**Technical Skills:** Proficient in Capital IQ, Thomson One, Bloomberg, MS Excel, MS Word, MS PowerPoint

**Activities:** Finance and Investment Club, Alpha Kappa Psi: Business Fraternity, Student Value Fund

**Interests:** Running, New York Jets Football, College Basketball