

Joseph A. Banks

josabanks@westcoastu.com / 123.456.7890 / Address

EDUCATION

West Coast Semi Target U – Business School City, CA
Bachelor of Science, Business Administration; Bachelor of Science, Accounting Expected Spring 2015

- **GPA:** 3.9/4.0
- Honors: Alumnus Scholarship, Business School Scholarship
- Relevant Coursework: Valuation, Financial Accounting, Microeconomics, Multivariable Calculus

WORK & LEADERSHIP EXPERIENCE

Boutique Investment Bank & Co. City, CA
Investment Banking Summer Analyst Summer 2013

- Supported senior bankers with financial modeling, preparation of marketing materials, and industry research for various Food & Beverage transactions
- Selected Transaction Experience:
 - \$100 Million Private Debt Placement of Quick-Service Restaurant Franchisee
 - Drafted the management presentation and other relevant documents for lenders
 - Conducted extensive due diligence on the company's fee simple properties, detailing \$80 million worth of collateralized real estate for the refinancing deal
 - Potential \$50 Million Sale of Food Processor & Distributor
 - Built a 3-statement operating model using historical ratios and management guidance
 - Analyzed management projections, noted indefensible growth assumptions, and revised the model accordingly
 - Constructed the confidential information memoranda sent out to strategic and financial buyers

UBS City, CA
Private Wealth Management Intern Spring 2013

- Sourced over 50 qualified leads per day in corporate databases for outreach lists
- Discussed macro, equity, and credit trends weekly to support client generation efforts
- Monitored client portfolios to ensure company records reflected up-to-date equity positions

Enterprise Software Startup City, CA
Business Development Intern Summer 2012

- Drove comprehensive sales campaigns, originating over \$5,000 in recurring monthly fees
- Built a sales and software lifecycle model in Excel for the Q2 Board of Directors meeting
- Pitched the product to app developers and angel investors at various technology conferences
- Strategized corporate policy with respect to pricing, marketing efforts, and customer acquisitions

Student Consulting Organization City, CA
Consultant Spring 2013 – present

- Admitted to the program with under an 8% acceptance rate for the spring semester
- Created a thorough, 55-page pitch deck for our client, Meat Packing Co., with positioning and marketing recommendations after extensive research of the local protein packing industry

SKILLS & ACTIVITIES

Skills: Valuation, Case Analysis, Microsoft Office Suite, Capital IQ, Salesforce, Statistics

Activities: Investing Club, Career Mentorship Organization, Mathematics Tutor, Social Fraternity