

WSO Monkey

Address
Phone # | E-Mail

EDUCATION

University of Non-Targets

- Bachelor of Arts, History
- Major GPA 3.80
- Relevant Coursework: Money, Banking & Financial Markets, Macroeconomics, Microeconomics, Management

City, State
May 2016

CFA Global Investment Research Challenge

- Research Analyst - the only undergraduate chosen to represent the University on the 3-person team

Global
Spring 2014

PROFESSIONAL EXPERIENCE

L/S Hedge Fund

Summer Analyst, Investment Management

New York, NY
Summer 2014

- Analyzed and recommended potential investment ideas for both long-only and L/S funds (~\$3B AUM); reported directly to Director of Research, and pitched investment theses to fund Portfolio Managers
- Conducted value-oriented fundamental research and built extensive financial models for company projections, sensitivity analysis and valuation
- Spread public comparables, calculated relevant multiples and valuation range of industry competitors
- Originated investment ideas by building industry-specific databases and benchmarking analyses
- Developed good working relationships to relevant sell-side analysts, attended investment conferences and collaborated with other buy side analysts on the team
- Utilized Bloomberg in researching company specific and macro trends; created automated valuation templates
- Created a universal news aggregate platform that crawls and reports news and blog sources for all fund positions

City, State
Dec 2013 – Jan 2014

Long-only IM

Winter Analyst, Equity Capital Markets

- Worked on the equity desk with Head of Trading of the Large Cap Growth Asset Manager (~\$9B AUM)
- Was responsible for position and P&L monitoring on a weekly basis; aggregated news flow to team members
- Performed extensive fundamental research on numerous companies, reading 10-K's, 10-Q's and annual reports
- Organized daily trade confirmations by matching time stamped trades with NASDAQ ticker quotes

Sell side ER

Summer Analyst, Equity Research

City, State
Summer 2013

- Assisted the Lead Analyst in covering the Transport & Logistics sector
- Helped to initiate coverage of two transport companies by writing key parts of the initiation reports
- Created PowerPoint presentations to introduce investment ideas to the senior management
- Built 3-statement financials models from scratch and benchmarked companies to their peers
- Created FactSet template to compare relative valuations of sectors versus the benchmark index

LEADERSHIP EXPERIENCE

Small VC start-up

Founder, Managing Director

City, State
2014 - Present

- Founded a niche VC company to invest in early-stage high-growth businesses in my local area
- Sourced 3 deals-to-date in tech and recreation sectors, seeking to work closely with mgmt teams to develop strategic agendas
- Currently in the process of closing the first investment (contingent on financing), due diligence completed
- Employing two friends on part-time basis to help source deals and conduct financial analysis
- Used as an opportunity to explore networking opportunities within the local business community

University Investment Group

Treasurer, Executive Board Member

City, State
2014 - Present

- Responsible for the finances (budgeting & fundraising) of the 60-member University Investment Club
- Created fundamental research reports and pitched to club members at the weekly meetings
- Worked with the university team in qualifying for and competing in the Upgrade Capital Fortress Challenge (stock market competition)

ADDITIONAL INFORMATION

Skills: Bloomberg, FactSet, MS Office, Vbulletin Coding, Basic Excel VBA

Accomplishments: City, State Fireman's Award recipient, People to People Student Ambassador Alumni, 200 hours volunteer community service

Interests: Personal Investing, Music & Guitar, Travelling, Dogs, ROTC

