

---

## Education

---

*Non-Target School*

*Bachelor of Business Administration in Finance*

*Major GPA: 3.60*

*Expected: May 2014*

---

## Professional Experience

---

**Private Equity Firm**

*March 2013-Present*

Acquisitions Analyst Internship

- *Underwrite and evaluate prospective commercial real estate investments through the use of quantitative and qualitative financial models*
- *Monitor current investment portfolio through construction of quarterly credit metrics and risk analysis*
- *Prepare external memoranda, pitch books, and investment summaries for committee recommendation*
- *Select transaction experience:*
  - *Southern California Convenience Store Operator: underwrote \$95mm portfolio*
  - *Clean Fuel Venture: constructed various credit metrics on \$30mm acquisition of gas stations*
  - *National Media Chain: performed market risk analysis on \$20mm acquisition*
  - *Healthcare Facility: managed third party communication for financing \$8mm acquisition*

**International Wealth Mgmt Firm**

*August 2011-February 2013*

Portfolio Analyst Internship

- *Produced thorough due diligence reports in a timely manner that assisted two wealth advisors manage over \$600 million in fixed income and equity investments*
- *Analyzed stock, ETF, and mutual fund investments using Morningstar and the Bloomberg Terminal*
- *Designed and instituted quantitative analysis software training which increased team production by 200%*
- *Constructed thorough fixed income analysis reports for weekly, monthly and quarterly client meetings*

**National Well-Known Bank**

*August 2010-January 2011*

Fiduciary Accounting Internship

- *Developed databases that streamlined the client account management process and increased departmental productivity by 90%*
- *Processed journals, Fed wires and reconciled investment activity for mutual funds and for Union Bank's wire transfer account*
- *Executed trades and wire transfers worth upwards of \$400 million daily*

---

## Scholastic Finance Activities and Research

---

**Breaking Into Wall Street**

*Summer 2013*

*Non-Target School*

Excel and Financial Modeling Fundamentals Course

- *Concurrently studied this course while working as an Acquisitions Analyst at Pontus Capital*
- *Applied course concepts to real world transactions*

**Finance Club**

*September 2011-January 2013*

*Non-Target School*

Vice President of Finance

- *Allocated funds each semester to finance weekly meetings and ensure club solvency*
- *Organized club's first tour of a global investment firm to increase peer's knowledge of the finance industry*

**Finance Research**

*January 2012-August 2012*

*Non-Target School*

Research Assistant

- *Assisted professor with due diligence on ETFs and other equity instruments using Bloomberg Terminal*
- *Gathered necessary data on accelerated market repurchases and open-market purchases*