

## WALL S. OASIS

1 Street  
New York, NY 10000  
555.555.5555  
email@gmail.com

### Experience

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#### BB Bank

New York, NY

Analyst, Consulting Group

Jul. 2010 - Present

- Analyze and recommend investment vehicles (mutual funds, separate accounts, collective trusts and alternatives) to the fiduciaries of pension funds, endowments, defined contribution plans and other institutional asset pools
- Continually monitor active investments, presenting findings to fiduciaries on a quarterly basis, and draft investment policy statements to define monitoring criteria
- Design and execute models to forecast the cost impact of fiduciary actions such as the implementation of automatic escalation or a change to the employer match formula
- Prepare pitch books, request for proposal responses and business development materials for new and existing client presentations
- Attend and contribute in sales presentations for new business opportunities; this has resulted in the acquisition of 10 new clients and approximately \$510MM in additional AUM, which has more than doubled the team's total AUM to approximately \$850MM
- Selected Project Experience:
  - Conducted an analysis of underlying investment management and administrative expenses for a \$17bn hedge fund's defined contribution plan and subsequently negotiated with the administrator on the client's behalf, resulting in a 37% reduction in expenses
  - Redesigned an \$8.5bn private equity fund's retirement plan menu by recommending 12 new funds, over a one year period the new menu outperformed the legacy menu by 7.56%
  - Advised the fiduciaries of an employee stock ownership plan (with approximately \$120MM in assets) in the food supply industry, generating revenue for the team in excess of \$150M per year

#### F500

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Analyst Intern

Sep. 2006 - Oct. 2006

- Analyzed sales data following trade shows to forecast production volume and associated costs
- Accounted for prototype stock in conjunction with preparing responses to request for products
- Created an Excel-driven utility to automatically generate UPC codes, significantly reducing the preparation time required for global product launches as well as reducing costs by obviating stand-alone UPC generation software

#### Oil Startup

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Project Management Intern

Jun. 2006 - Aug. 2006

- Assumed responsibility for determining the viability of an alternate supply chain for a paper product used in the construction of oil pipelines
- Researched and recommended a materials supplier in Japan and production facility in China to senior management, which yielded notable cost savings in comparison to the traditional practice of licensing a ready-for-sale product

### Education

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#### Non-target

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Master of Business Administration

May 2010

#### Non-target

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Bachelor of Science in Business Administration

May 2007

### Additional Information

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- **Securities Licenses Held:** Series 7, 66 and 33
- **Interests:** Auto racing, tennis and wakeboarding