

Full Name

Address • Hometown, State Zip • Phone# • Email

Education

Non-Target Private University, ____ College of Business and ____ Honors College _____, PA
Bachelor of Science in Business Administration Anticipated Graduation: June 2015
Majors: Finance and Economics Cumulative GPA: 3.86/4.00

Achievements: ____ University Deans List: All Terms, ____ Finance & Investment Group Investment Competition Scholarship

Relevant Coursework: Course List including upper level Finance, Econ and Math courses

Work Experience

Top Tier Investment Manager _____, PA
Division Name – Fundamental Equity Team – Investment Analyst Intern March 2014 – September 2014

- Supported analysts and portfolio managers by conducting comprehensive research, building financial models, providing valuation analyses and presenting my conclusions on long and short investment opportunities across the global equity universe
- Compiled notes and questions for meetings with management teams during IPO roadshows, non-deal roadshows and general meetings to evaluate participation in stock offerings or assess current holdings
- Increased efficiency of daily, weekly and monthly reporting through process automation; created additional reports including a fund liquidity profile to help determine illiquidity, factor exposure and lending risk of equities in the portfolios

Tier 2/3 Research and Brokerage Firm _____, NY
Division Name – Equity Research Intern March 2013 – September 2013

- Assisted senior analysts by performing in-depth company research, projecting financial performance, conducting valuation analysis and publishing detailed initiation and pre-IPO reports for companies in the Emerging Technologies and Financial Technologies sectors
- Executed detailed industry research using resources such as 10Ks, industry reports and Bloomberg to evaluate industry trends and growth opportunities
- Created marketing materials for use by analysts and research sales in meetings with institutional clients
- Assisted the research team in conducting channel checks by talking to various industry suppliers, distributors and end customers to help predict product sell-through and traction with customers

Tier 2/3 Research and Brokerage firm _____, PA
Division Name – Institutional Brokerage Operations Intern March 2012 – September 2012

- Recorded customer equity, index and ETF option orders and allocated CMTA's to customer orders to ensure proper delivery
- Assisted in development of order management system to improve efficiency via straight through processing of trades

Other Experience & Leadership

University Endowment Fund _____, PA
Student Run Investment Fund – Investment Analyst September 2013 – March 2014

- Managed the performance of U.S. midcap stocks in the financials sector and monitored performance relative to S&P MidCap 400 Index benchmark as part of a \$1.2M investment portfolio that returned 42.7% in 2013
- Prepared sector specific reports detailing performance, industry weightings, economic drivers and valuation analyses to determine portfolio sector weights and gain better understanding of overall sector
- Led team in identifying and pitching three investment recommendations to investment professionals and classmates, receiving the highest voting percentage in the class for each stock pitch

University Finance & Investment Group _____, PA
Name of Investment Competition – Portfolio Manager January 2014 – March 2014

- Led team of 5 student analysts to a 1st place finish in a ten week investment competition using a stock market simulator
- Worked with analysts to help them develop an understanding of fundamental equity research and valuation techniques such as relative valuation and discounted cash flows
- Analyzed investment opportunities by evaluating financial statements, identifying catalyst and conducting valuation analyses to determine upside and downside potential

Investment Fund Philadelphia, PA
Co-Founder and Partner August 2012 – April 2013

- Actively managed a \$10,000 student-run investment portfolio comprised of equity and derivative positions which outpaced the S&P 500 by 300bps
- Performed analysis of companies to find long and short investment opportunities

Skills & Activities

Technical Skills: FactSet, Bloomberg Terminal, Aladdin, Thomson One Analytics, Microsoft Office

Activities: New York Society of Security Analysts, University Finance and Investment Group, University Club Lacrosse, Intramural Sports: Football, Softball and Basketball, Weightlifting