

[First Name] [Last Name]

Street Address | City, State zip-code | Cell # | email

EDUCATION:

Non-Target State University – College of Business

Bachelor of Business Administration in Finance

Minor in Accounting

City, State

May 2019

GPA: 3.9 / 4.0

Athletics: Varsity Football – NCAA Division 1, Conference _____

Honors: 2018 Financial Executives International Academic Award Recipient, Multi-year (Conf.) Commissioners Academic Medalist

Coursework: Corporate Finance, Economics, Financial Accounting, International Insurance Markets (abroad), Wall Street Prep

Skills: S&P Capital IQ, Bloomberg Certification, Microsoft Excel, Microsoft PowerPoint, Microsoft Word

WORK EXPERIENCE:

Boutique M&A Firm

City, State

Investment Banking Summer Analyst – Mergers & Acquisitions

June 2018 – August 2018

- Assisted senior bankers with M&A advisory in the healthcare, insurance, and technology services industries
- Presented comparable company analysis, precedent transaction analysis, financial modeling, and DCF valuation
- Developed CIM and pitch book presentations for clients using PowerPoint
- Selected Transaction Experience:
 - Project I – potential sale of a (company description)
 - Developed and prepared preliminary analysis and a DCF valuation for our kickoff meeting using financials provided by management resulting in the company signing an engagement letter with (our firm name) to proceed with a sale process
 - Project II – potential sale of a (company description)
 - Involved in preparing initial due diligence and the reconstruction of the company's internal financial statements for management presentations resulting in increased buyer interest due to improved transaction transparency
 - Project III – potential affiliation of a (company description)
 - Contributed to a detailed financial overview of the target by utilizing statutory financials to provide commentary regarding underwriting performance, reserves analysis, and historical company trends relative to industry peers
 - Presentation of the financial overview resulted in our client pursuing an affiliation with the target

Investment Firm Name

City, State

Summer Analyst – Equity Research

May 2017 – August 2017

- Executed financial modeling, valuation, and due diligence research for stocks
- Compiled daily summaries of market coverage and portfolio company activity for portfolio managers
 - Ball Corp. (“BLL”) – Projected financial statements and calculated discounted cash flow analysis
 - Calculated a DCF valuation of \$40 per share compared to the present market value of \$42 per share
 - Advised to not purchase BLL given our DCF and relative valuation revealed BLL to be slightly overvalued based on flat/negative organic growth in Ball Corp.'s core aluminum packing segments
 - Medtronic (“MDT”) – Projected financial statements and calculated discounted cash flow analysis
 - Calculated a DCF valuation of \$91 per share compared to the present market value of \$80 per share
 - Advised to hold our existing position in MDT after updating forecasts to reflect alterations in the U.S. healthcare environment and Medtronic's supply chain shortage of insulin monitoring sensors
 - Valvoline (“VVV”) – Projected financial statements and calculated discounted cash flow analysis
 - Calculated a DCF valuation of \$33 per share compared to the present market value of \$22 per share
 - Lead a call with VVV investor relations to discover future expansion plans in the U.S.
 - Advised to purchase VVV due to market share growth in North American sales and instant oil change services segment in addition to superior operating margins relative to peers

LEADERSHIP EXPERIENCE:

Campus Finance Club

City, State

President & Co-Founder

January 2018 – Present

- Established the sole finance club and finance networking organization on campus at Non-Target State University
- Generated membership from over 50 students and over 30 financial professionals to date
- Headed projects in partnership with member professionals, coordinated networking events, and hosted professionals on campus
- Presented BRFN recommendations of five new private equity funds to Tennessee Consolidated Retirement System (“TCRS”) by utilizing Bloomberg to analyze the organization's private equity portfolio resulting in an offer from TCRS to expand the project