

Anonymous

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EDUCATION

Top Liberal Arts Target School

Bachelor of Arts in Humanities (English/History/Anthro/Philosophy)

Target Location

Class of 2014

WORK EXPERIENCE

No Name Boutique Advisory Shop With 8 Employees

Analyst

Boston, MA

October 2014 – Present

- Prepare pitch books and draft memorandums highlighting target client profiles and solutions for senior management
- Program and monitor target client database and internal pipeline used in marketing efforts
- Build financial models projecting capital needs for insurance/reinsurance companies and banks
 - Project potential 'VM-20/AG48' reserve and 'redundant reserve' demand for writers of XXX/AXXX products
 - Support development of quantitative models for market research and due diligence (sizing reserve/collateral needs for Variable Annuity, Stable Value, and other insurance products; project potential contingent capital needs, etc.)

Selected Transaction Experience:

- \$500 million private placement of structured note for SIFI (Systemically Important Financial Institution) to support capital requirements for Stable Value business [**closed**]
 - Created pitch book for client containing extensive due diligence and highlighting deal structure
 - Assisted in reviewing term sheets for 1 of 3 transaction financing providers (\$150 mm)
- \$130 million in financing to support the acquisition of a block of business from global reinsurer by financial sponsor [**closed**]
 - Created draft pitch book for client containing extensive due diligence and highlighting deal structure
 - Support communication between all parties (financing provider, acquisition target, acquirer, and legal counsel)
 - Assist in reviewing term sheets and take notes on all conference calls

Top Asset Manager/Mutual Fund

Equity Trading Intern

Boston, MA

June 2013 – August 2013

- Rotated across the healthcare, consumers, financials, technology, program and special equities trading desks
- Assisted traders with day to day activities including working with brokers, researching stocks, attending management meetings and helping implement trading strategies
- Selected projects for Trading and Quantitative Analyst Teams included:
 - Analyzed trading fills from the program trading desk to identify how liquidity is sourced from dark versus lit venues by broker and by algorithm. Conclusions from project used to further optimize trading strategies and improve algorithm performance
 - Conducted in depth analysis of the IPO's and Follow On Offerings market between January 2012 to June 2013 with Syndicate and Quantitative Analyst teams by tracking securities performance and ownership profile of over 80 securities

LEADERSHIP

Top Liberal Arts Target School Investment Club

Vice President

Target Location

September 2010 – May 2014

- Organized weekly club meetings and assist with staffing responsibilities to executive board members
- Led educational presentations for all club members and assisted new members in creating their first stock pitch
- Served as sole liaison between the club and the Investment Office to ensure proper risk management protocol was in place

Target School Men's Crew Team

Position

Target Location

January 2011 – May 2014

- Led team's varsity boat by developing and implementing racing strategy
- Competed in biweekly regattas in fall season and weekly regattas in spring season

ADDITIONAL INFORMATION

Computer: Proficient in MS Office (including Excel VBA), Bloomberg, and basic Python/Java

Interests: Fashion (trader and collector of vintage and limited edition clothing items and generated >\$5k in revenue through), Blogging (insert blog here) and Chess (former competitive chess player, member of NYC chess club)