

X

X

EDUCATION

Small State School

Bachelor of Science in Finance

Expected May 2016

- **GPA:** 3.47 / 4.0

WORK & RELEVANT EXPERIENCE

Hedge Fund

Summer Analyst

May 2014 – August 2014

- Worked with the portfolio manager of a long/short equity fund
- Activities:
 - Built financial and valuation models.
 - i. Put together three-statement models and valued companies based on DCF, Multiples, and Sum-of-the-Parts.
 - ii. Modeled the financials by understanding the drivers of business through information gathered from public filings and conversations with management.
 - Contacted management teams and participated in conference calls.
 - Made recommendations to buy or sell short.

Student Investment Fund

Founder

August 2014 – Present

- Show members how to conduct due-diligence, how to build financial models, and how to find potential investments.
- Focus on finding undervalued companies within attractive sectors by utilizing a “top-down” approach.
- Projecting to raise somewhere between \$20,000 and \$40,000 next year.
- “Special situation” pick generated a ~40% return in a little over 3 weeks. We took advantage of the outcome by building a straddle option position, as the catalyst was binary in nature: the company was either going to go down the path of bankruptcy or was going to receive funding from a bank creditor.

Personal Investing

Portfolio Manager

June 2013 – Present

- Manage a small, concentrated portfolio of small-cap stocks.
- Focus on companies that are significantly undervalued based on normalized or potential free cash flow and earnings.
- Use screeners, NT-filings, 10-12b filings, and SumZero to generate ideas.

SumZero

Contributor

August 2014 – Present

- Provide some of my investment ideas for an exclusive community of “buy-side” professionals.
- Communicating with both portfolio managers and analysts has allowed me to improve as an analyst and investor.

SKILLS & INTERESTS

Skills: MS Office Suite, due-diligence.

Interests: I enjoy investing, listening to a variety of music, and playing chess and tennis.