

## WORK & LEADERSHIP EXPERIENCE

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### Mid – Tier BB

New York, NY

#### CDO Trading

7/2015 – Current

- Part of three person CDO/CLO trading team managing \$1 gazillion; \$600 trillion of ABS and TRUPS CDOs; delivered 2012 profits of approximately \$1 through various market strategies
- Assist global head of CDO trading with market positioning and securities valuation
  - Compile “marketing packages” on individual bonds for internal and external distribution
    - Contains quick snapshot of CDO specifics; provide yield tables shown with multiple scenarios varying by CDR, CPR, reinvestment assumptions and interest rate changes; model various call scenarios
  - Review daily trading activity in order to determine value in potential trading opportunities
    - Report daily mark to market and trading activity to supervisors and back office; compile and distribute daily report summarizing current market exposure in order to more accurately assess risk; work with funding desk
  - Maintain and continuously update shared disk space that contains relevant securities documents
    - Includes trustee reports, indentures and operating memorandums; create new mapping and script system to automatically pull reports; serve as point of contact for trustee correspondence when assessing documents
- Ten weeks of training hosted by [REDACTED]

### Same Mid-Tier BB

New York, NY

#### Intern

6/2011 – 8/2011

- Ten-week rotational program spending three weeks on each the Rates, MBS/ABS and FX desks
- Completed ten-week research project on Limited Brands that culminated in a thirty-minute presentation in front of various employees including head of strategy for Americas, head of rates sales, and numerous other VP and MD’s
- Created MS Excel model to price interest rate swap and determine overall transaction amount given a specific clients DVO1; model also proved the PV of future cash flows equaled swap notional
- Delivered presentation at MBS/ABS morning meeting about specific Freddie Mac front sequential MBS that would allow clients to pick up 25 basis points of extra yield while still providing protection from extension

### BB

Regional Office

#### Intern, Private Wealth Management

5/2010 – 8/2010

- Worked under VP of Investments managing \$150 million of client assets; assisted in bringing in \$2 million of new business; created pitch books for client presentations; assisted with portfolio allocation
- Built Excel models analyzing past investment performance and predicting future performance; performed due diligence on potential investments; analyzed and summarized institutional research
- Performed fundamental and technical analysis on client portfolios; assisted with and gave recommendations on securities selection

### Personal Venture

Lake OK, VT

#### Founder, Operator

5/2007 – 8/2009

- Founded and operated a high end boat detailing company; grossed sales over \$24,000 in three summers
- Increased sales YoY (~200%) through marketing campaigns; included door to door advertising, contracting with nearby marinas; performing free demos; and frequent customer cards
- Managed workforce of 5 employees and ran day to day operations; liquidated company for \$6,500

## EDUCATION

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### North eastern semi target

Where is this?

#### Bachelor of Arts in Economics

9/2008 - 5/2012

- **GPA:** 3.7 / 4.0; SAT: 1350
- **Honors:** Cum Laude; Varsity Football Letter-winner
- **Relevant Coursework:** Corporate Finance; Investments; Statistics; Business Calculus; Political Economics

## SKILLS, ACTIVITIES & INTERESTS

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**Certifications & Training:** Series 7; Series 63; CFA Candidate

**Activities:** Student Ambassador to my home; Cannon Leadership Program; D1-AA Football

**Interests:** Reading; Football; Baseball; Basketball; Travel; Skiing/Snowboarding; Boating