

Saul Goodman

Diagon Alley | Chicago | 555-555-5555 | Saul@gmail.com

Experience

Credit Ratings Agency

Chicago

Junior Associate

November 2014 – Present

- Monitored a portfolio of 30+ speculative grade companies spanning the business and consumer services, manufacturing, packaging, and consumer durables industries, amongst others
- Perform fundamental credit analysis and model financial transactions, including LBOs, M&A, dividend recapitalizations and refinancing transactions to evaluate impact on capital structure and financial health of firm
- Contributed directly to the credit ratings committee process by preparing and presenting financial projections using scenario and sensitivity analysis techniques, quarterly cash flow models to assess companies' liquidity and loss given default analysis
- Monitor risk triggers, quarterly financial statements, covenant compliance certificates and credit agreements of all portfolio companies
- Communicate regularly with issuers (CEO/CFO/Treasurer), senior bankers, private equity sponsors to assist with the credit ratings and monitoring process
- Assist with writing press releases and research opinions to reflect forward-looking credit profile of companies

Investment Advisory Firm

Chicago

Analyst

June 2014 – October 2014

- Report to the Chief Information Officer of an investment advisory firm with assets across a variety of investment styles including direct fund investments, fund of fund investments, active real estate deals, and estate planning
- Ensured all client monthly and quarterly performance reports are produced, reviewed and distributed to various client groups across multiple platforms under tight deadlines
- Prepare client asset schedules ahead of monthly meetings with clients – including tracking of all new and current investments, manager performance analysis and liquidity opportunities for each investor

BB I-Bank

Baltimore, MD

Analyst

November 2012 - May 2014

- Forecasted funding requirements from various business lines for BB I-Bank money markets settlements, fixed income and equities accounts based on trading activity, collateral and liquidity needs
- Manage end of day cash positions and reconciliation of accounts while investigating failed trades and cash breaks with related parties to take corrective actions
- Reduced variance by about 30% between funding projection and actual funding movements by streamlining the forecasting process to better capture all activity that settles in the account by working with various departments
- Prepare detailed variance reports that explain differences between projections and actual funding results which resulted in improving projections and providing detailed swing analysis for the Treasury desk

Boutique I-Bank

New York, NY

Intern

January 2011- May 2011

- Conducted top down and bottom up equity research on various sectors to support the company's equity portfolio
- Presented buy and sell stock pitches to senior brokers and managers which resulted in additions to the company's portfolio
- Participated in research meetings with analysts and managers to discuss possible new investments

Education

- State University
- Bachelor of Arts: Economics & Political Science (Double Major)
- GPA: 3.6 Dean's List: Fall 2008-Spring 2011
- CFA Level 2 Candidate

May 2011

Skills

- Computer Skills: Microsoft Word, PowerPoint, Excel, Factset, Bloomberg
- Language Skills: English and moderate Spanish

Interests

- Financial Markets & Investing
- Basketball, Football, Baseball, Reading