

John Doe

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EDUCATION

Non-Target University, Blank College of Business **New York, New York**
BSBA in Finance, Economics **May 2015**

- **GPA:** 3.73 / 4.0
- **Honors:** Magna Cum Laude
- **Relevant Coursework:** Security Analysis/Portfolio Management, Investment Analysis, Investment Practicum

WORK & LEADERSHIP EXPERIENCE

Investment Fund **New York, New York**
Analyst **August 2015 – Present**

- Designed and assisted in building out the analysis and monitoring processes of potential and current counterparties in xxxxxxxx and xxxxxxxx hedging business lines
- Evaluated ~ 50 “niche financial institutions” for financial stability and performance within the “market which we operate and are evaluated”
- Worked closely with business development in adding 7 new relationships and reviewing ~40 previously approved relationships
- Developed benchmarking and trend analyses procedures for institutions relative to industry peers and recently issued capital adequacy requirements for financial institutions

University Investment Club **New York, New York**
Portfolio Manager/Analyst **August 2014 – May 2015**

- Managed a University endowment fund value-oriented equity portfolio of x million along with 12 other faculty-selected students
- Monitored two equity positions for the duration of two semesters and provided regular updates on developments and valuations using methods such as discounted cash flows, relative analyses, economic value-added calculations, and present values of growth opportunities (writing sample available)
- Organized and carried out portfolio management tasks, such as rebalancing the portfolio, analyzing sector weightings, assessing portfolio risks, running Monte Carlo simulations and interpreting the impact of capital markets developments on the portfolio
- Assisted in organizing a panel of portfolio managers to speak at an annual event hosted by University as a

BB Asset management firm **New York, New York**
Credit Analyst Intern **April 2014 – May 2015**

- Conducted initial financial statement analysis and pro forma capitalization tables for ~60 new investment bank-issued private and public debt placements from domestic and foreign companies in a wide range of sectors
- Continually updated existing credits’ spreadsheets using annual and interim reports and reported to the respective credit analyst with commentary about update and adjustments
- Completed an independent credit review of a company and presented a full presentation to the internal investment committee for approval which resulted in the purchase of xxxxx in commercial paper (writing sample available)

SKILLS, ACTIVITIES & INTERESTS

Languages: Functional proficiency in Spanish

Certifications & Training: Bloomberg Terminal Certification, professional association

Activities: College activities/clubs?

Interests: Investing and capital markets, sports, contemporary and classical guitar studies