

FIRST M. LAST

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555.555.5555

WORK EXPERIENCE

Small Firm

Client Associate – (Multi Family Office)

West Coast, CA

June 2014 – Present

- Involved in all aspects of transactions including due diligence, preparation of internal team, financial statement modeling, and client presentations for ultra high net worth individuals and other various clients
- Provided timely financial assistance, advice, and due diligence for various types of financial affairs including -

Selected Transaction Experience:

- *Staffed as point contact on ultra high net worth client, handling all aspects of client function, maintenance and needs. Performed quarterly financial review meetings and created investment fund profile by tracking fund performance, reviewing returns and projecting expectations, adopted as firm wide offering generating increased fees*
- *Due to performance of client 1, chosen again to be account manager of new client suffering distressed financial management. Within 1 quarter created positive cash flow by reducing administration costs, streamlining financial procedures, secured business loan that enabled acquisition of competitor, suggested and adopted technologies that increased bottom line by 1%. Due to performance client increased fee and referred 2 new clients to firm.*

Biotech Startup (Acquired by large firm)

Accounting Analyst – Finance; financial reporting

West Coast, CA

March 2012 – June 2014

- Conducted review and integration of financial statements which was provided by subsidiaries then assisted by providing forecasted quarterly financial results while also conducting variance analysis
- Placed on integration team and conducted data integration for newly acquired companies, including financial system mapping, tax planning, and asset/debt restructuring
- Liquidated subsidiary by closing outstanding PO's, executing sale of assets, and packaging debt for acquisition

EDUCATION

CSU – Not USC/UCLA/UCB/STAN

Bachelor of Science in Business

West Coast, CA

Class of 2013

- Completed all business classes. Member of Accounting Association, & Student Finance Association
- Founded student investment club and volunteered for event planning and budgeting with Associated Students

Comm College

Associate of Science in Accounting

West Coast, CA

Class of 2010

- Founding member of registered club “Future Business Leaders of America”, assisted with fundraising & budgeting
- Certified in all lower division business major classes

LEADERSHIP

Youth Hockey Club

Head Coach

West Coast, CA

2014 – Present

- Led all aspects of team management including player performance, analytics, budgeting, strength & conditioning
- Cultivated relationship with collegiate scouts, secured funding, provided career & technical advice to athletes & families

Event production company

Co-Owner

West Coast, CA

January 2014 – Present

- Founded DJ & event production company operating in the high school, college, corporate, & wedding markets
- Facilitated operations, financial reports, marketing, pricing including breakeven points, & SWOT analysis

OTHER INFORMATION

Internships: Large Fin Serv firm: Fall & Summer & Real Estate investment firm

Modeling: Completed Current Companies formal financial modeling program run by Wall Street Prep

Computer: Expert in Excel, Microsoft office, NetSuite, SAP, Morningstar, & other financial software

Certifications: Bloomberg, working towards CAIA Level 1, March 2016