

NAME
Address | E-mail

EXPERIENCE

Small PE Fund

New York, NY

Analyst

xx - Present

- Conducted research on the X sector to draft Teaser/Executive Summary for an \$X EBITDA company
- Assisted in executive search for newly formed X sector \$X EBITDA company
- Performed research on potential investors and created buyer lists focusing on X and Y regions

Asset Management/PE/FOF

New York, NY

Analyst

xx - xx

- Assisted in sourcing investment in a \$250 million long/short equity fund by performing portfolio analysis, initiating due diligence, arranging on-site visits, and preparing materials for final execution
- Conducted research on 3 potential funds by drafting call notes and creating portfolio models with key metrics including exposures, asset classes, and performance relative to indices
- Performed comparable fund/index analysis to assess performance of 3 fund portfolios, resulting in updated allocations, portfolio resizing, and risk mitigation of portfolios
- Designed investor communication materials which analyzed portfolio diversification across strategy, industry, asset class, and region; Developed automated return tracking spreadsheets of 110 indices and 60 underlying funds
- Spearheaded marketing campaign by designing pitch books detailing industry overview and analysis of firm's funds
- Constructed data room for a private transaction that entailed acquiring a minority stake in a private equity firm

BB

New York, NY

Summer Analyst

xx - xx

- Assisted in \$3 bln debt issuance of a \$16 bln market cap company by verifying syndicated bond allocation
- Managed trader risk by booking trades for Fixed Income desks, verifying trader estimates against system P&L, and tying out trade blotters against book results
- Performed P&L production, analysis, and reporting for product control and trading desks

Asset Management

New York, NY

Analyst

xx - xx

- Conducted extensive due diligence on 8 funds for potential investment and assisted in drafting investment theses on 5 funds, resulting in 2 new investments in a long/short equity fund and a multi-strategy fund
- Designed quarterly investment portfolio reports and due diligence/fund research presentations detailing performance and risk analytics

Boutique Retail/Luxury Goods Company

New York, NY

Intern, Production & Finance

xx - xx

- Developed cost models based on research of potential local suppliers, created projections of potential clients/company growth, maintained sales/buy order spreadsheets, and conducted due diligence on prospective retailers
- Sourced fabrics/materials for upcoming lines and collaborated with manufacturers to ensure accurate garment details, resulting in a more streamlined production process and increased quality control

EDUCATION

Top 50 Non-Target

New York, NY

B.S. in Finance, Minor in Economics

June 2013

- **Major GPA:** 3.9 | **Cumulative GPA:** 3.7
- **Honors:** Magna Cum Laude, Dean's List, Academic Scholarship, Finance Scholarship

OTHER

Languages: Spanish

Technical Skills: Bloomberg, CapitalIQ

Activities: Tech Startup, College Finance Club, Hedge Fund Club, College Art Magazine, Teacher Volunteer

Interests: Breakdancing, Photography, Trolling on WSO