

# Name

Address | Phone Number | email

## EDUCATION

### **Non-Target State School**

*Bachelor of Arts in Business Administration with a Concentration in Finance*

**GPA: 3.60**

CFA Level One Candidate

City, State

May 2020

(Date of Exam: June 2020)

## EXPERIENCE

### **Portion of School Endowment Fund**

*Portfolio Management & Investment Intern*

City, State

May 2019 - Present

- Managed over \$1.7mm in an equity and credit portfolio used to fund the university's **Redacted** Tutoring Center
- Led a team of four investment analysts, followed a bottom-up stock selection approach within the healthcare sector
- Constructed discounted cash flow and relative valuation models to value current and potential portfolio investments
- Authored over six research reports and provided portfolio performance updates to the program's board of directors
- Performed economic and attribution analysis of the equity portfolio consisting of 43 holdings to generate new ideas

### **Real Estate Private Equity Firm**

*Real Estate Private Equity Intern*

City, State

October 2019 - January 2020

- Utilized Argus to model properties ranging between \$10 to \$50mm and assisted firms' analysts during phone calls with brokers
- Built dynamic financial statement models in Excel to project financial performance and relevant metrics for senior management
- Developed and organized financial statements as well as strategic presentations for 20 + prospective acquisitions
- Assisted analysts in performing due diligence, underwriting, and sourcing 20 + potential acquisitions **for the firm**
- Drafted over six market research and business strategy reports for senior management resulting in better asset management and acquisition potential for both existing and potential properties

### **Top 10 Private Equity Fund of Funds**

*Private Equity Investment Intern*

City, State

January 2019 - October 2019

- Conducted in-depth due diligence reviews on over 100 private equity and venture capital funds ranging between \$10mm to \$200mm in size and inputting relevant data into proprietary firm database and Excel
- Completed ad-hoc projects for analysts on an \$80 billion fund of fund team, \$10 billion co-investment team, \$6 billion credit team, and \$4 billion infrastructure team resulting in a more efficient fund of fund team
- Performed preliminary fund manager due diligence reports for over five potential management teams using Burgiss Private iQ, Thomson One, and Bloomberg Terminal resulting in higher quality work for the firm's analysts
- Analyzed financial statement data quarterly to calculate fund performance metrics, including gross/net MOIC and IRR
- Built Excel spreadsheets to calculate investment performance and ensure accurate transcription of new financial data

## ACADEMIC PROJECTS AND COMPETITIONS

### *Competitions*

January 2020

- CFA Institute Research Competition: Currently competing in an equity research competition against 7 other schools
- 1<sup>st</sup> place winner (Seeking Alpha Research Report Competition): Pitched a stock to a panel of judges against five other teams
- 1<sup>st</sup> place winner (Economic Scenario Competition): Allocated a simulated portfolio of \$50,000 given various economic scenarios

### *Fundamentals of Corporate Finance, Valuation Project*

November 2018

- Collaborated with a group of three peers in valuing **Redacted**, and ultimately recommending an overweight rating
- Assisted in building a discounted cash flow model, comparable public company analysis, and a sensitivity analysis
- Drafted a 15+ page research report detailing the company's valuation, as well as key drivers for value
- Presented team's results to the class and defended arguments during a 30-minute Q&A

## EXTRACURRICULAR ACTIVITIES

### **Redacted** Honey Volunteer / City, State

January 2018 - Present

Volunteered at a local honey business every Tuesday educating students about the benefits of honey

### **Redacted** Medical Center Volunteer / City, State

March 2016 – May 2016

Handed out fresh produce, canned foods, and hot meals to hundreds of people across multiple food drives

## INTERESTS

- Chess, Playing Soccer, Hiking, and avid Formula 1 fan