

## **EDUCATION**

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### **University of**

*Bachelor of Business Administration in Finance*

**City, State**

*Graduation Date: May 2019*

## **PROFESSIONAL EXPERIENCE**

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### **Investment Bank**

**City, State**

*Investment Banking Analyst*

*May 2019 - Present*

- Created confidential information memorandum, client teaser, leveraged buyout model, and performed comparables analysis for \$23mm transportation company on a sell-side mandate. (Deal was pulled at the letter of intent phase.)
- Presented marketing material to corporate development team of a potential strategic acquirer for <\$5mm business services company resulting in closing of the process in October of 2019.
- Analyzed financials and performed comparables analysis for \$25mm roll up acquisition in the transportation industry.
- Developed operation teasers, financial information teasers, and developed confidential information memorandums, for seven lower-middle-market sell-side mandates in various stages of process.

### **Investment Bank**

**City, State**

*Winter Investment Banking Analyst (Part time)*

*October 2018 - May 2019*

- Completed Wall Street Prep financial modeling course and demonstrated the techniques learned to Managing Directors of the firm.
- Lead for all marketing both digital & physical on buy-side mandate for add-on acquisition for private equity firm in the business services industry.
- Consulted directly with Managing Directors on client calls, produced minutes, planned processes, built-out a CRM database, and tracked various processes.
- Held responsible for keeping all active deal financial statements up to date and for client outreach to receive materials needed ahead of time to facilitate processes.

### **Financial Advisory Company**

**City, State**

*Summer Intern*

*June 2017 - August 2017*

- Managed client risk utilizing insurance in order to bring more stability and less risk to a client's finances.
- Created opportunities for clients to realize their wealth potential by allowing clients to take advantage of a wide variety of investment strategies, including stock, bond, and insurance investments through a subsidiary via face to face consultation.
- Surpassed firm marketing goals for interns by 50% throughout the internship.

## **LEADERSHIP**

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### **Church Name**

**City, State**

*Community Leader*

*October 2015 – Present*

- Lead various community health projects including blood drives, community clean-up days, and a public youth group movie night.
- Lead young men's groups in community projects which include construction, lawn care, gardening, and hunting expeditions.
- Helped grow church's total Planned Givings by 12% year over year since 2016.

### **Event Name**

**City, State**

*Member & Attendee 2018 & 2019*

*September 2018 & 2019*

- Established connections from around the (redacted) United States in industries such as private equity, investment banking, financial advisory, commercial lending, and commercial real estate,
- Youngest invited Member outside of student body both 2018 & 2019.