

## EDUCATION

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### Top 20 Undergrad Business School

Bachelor of Science in Finance – Cum Laude

Cumulative GPA: 3.5

**Honors:** Research Fellow; 2014 New York Business Plan Competition Winner; President's List

**Applicable Course Work:** Advanced Managerial Finance, Intermediate Accounting II, Applied Calculus, and Business Statistics

**Location**

May 2017

## PROFESSIONAL EXPERIENCE

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### Super Regional Bank

Leverage Finance Analyst

**Location**

June 2017– Present

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### Private Equity Portfolio Company

Corporate Development Intern

**Location**

January 2017– May 2017

- Conduct market research to identify trends within the healthcare sector regarding: consumers, reimbursements, and insurance premiums
- Source potential acquisition targets, identify roll-in capability to existing practices, and model EBITDA to see synergistic gains
- Analyze P/L of current practices to identify underperforming groups, and help implement strategic initiatives to improve performance

#### Select Transaction Experience:

- \$30M Facility & Practice acquisition –(Closed)

- Developed valuation of target using DCF, Guideline Multiple and Precedent Transaction
- Conducted a revenue analysis to create a pro-forma statement showing the additional revenue as a result of billing structure

### Lower Middle Market PE Firm

Private Equity Intern

**Location**

August 2016 – November 2016

- Involved in all aspects of transactions including initial due diligence, preparation of the CIM, modeling, and presentations
- Responsible for performing company comparable and precedent transaction analyses in Excel

#### Select Transaction Experience:

- \$10M Buy-side carve-out acquisition of an Information Management Company –(Closed)

- Built a financial model to show debt financing under multiple capital structures, and the effects of leverage
- Analyzed revenue across the different business lines to identify revenue generated from divisional acquisition

### MS/GS/JPM

Investment Management Intern

**Location**

February 2016 – August 2016

- Maintained database of 1,500 clients and prospects while working with advisors to maximize referrals and sales opportunities
- Collaborated with financial advisors & private bankers to provide analysis on asset allocation based on clients' goals and risk tolerance
- Performed due diligence on 40 client portfolios and made bi-monthly recommendations to current asset allocations

### Startup

Vice President of Business Development

**Location**

January 2014 – December 2014

- Headed a 5 person team that developed a business plan and investor presentations in order to raise \$100,000 in capital
- Helped secure an endorsement by Dr. Robert F. Ward, MD FACS (Clinical Vice Chair, NYU Langone Medical Center) for a first to market product designed to reduce the duration and discomfort of tracheostomy maintenance caregiving sessions
- Assisted in securing an offer to buy the product and patent rights outright for \$750,000

## LEADERSHIP EXPERIENCE

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### Election Committee

President & Co-Founder

**Location**

January 2016 – May 2017

- Reviewed 75 candidates for on-campus positions; candidates judged on past accolades and experience
- Oversee general elections in both fall and spring semester while handling on-going organizational due diligence

### Community Service

Student Tutor

**Location**

September 2015 – May 2017

- Promote the enhancement of student learning through outreach in the local community
- Spend 8 hours a week to tutoring students on application of PowerPoint, Access, and Excel

### Student Government

Treasurer & Communications Chair

**Location**

September 2015 – September 2016

- Guided the committee through event-specific media initiatives designed to increase awareness and interest in events
- Prepared a budget, presented it to the allocation and internal audit committee for approval, and ensured activities adhere to the budget

### Country Club

Outside Staff Manager & Caddy

**Location**

April 2011 – August 2016

- Managed round count totals and invoices for membership fees in excess of \$5,000 a day while training employees on initial billing
- Promoted to outside staff manager managing 35 staff including caddies and bag room attendants

## SKILLS, AND INTERESTS

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**Certifications & Training:** Bloomberg Certified (Equities, Commodities, Fixed Income and FX); Experience with FactSet, Capital IQ, Morningstar, 3D, CRM, Microsoft Access; Proficient in Microsoft Excel, Microsoft Word, and PowerPoint

**Interests:** Playing/Teaching Golf, Surfing, Community Outreach, Reading