

Name

address | phone number | email address

WORK & LEADERSHIP EXPERIENCE

Middle Market Bank

West Coast

Investment Banking Analyst, Public Finance

~1 year

- Collaborated with professionals across multiple firms to facilitate over 15 completed general obligation bond and special tax bond transactions
- Performed quantitative analysis, including analysis of entities' creditworthiness and capacity to issue debt
- Supported production of proposals and transaction documents, and assisted with deal management
- Assisted the department with marketing and prospecting tasks, creating proposals, interview books, and credit rating presentations
- Redeveloped weekly equity and treasury markets update presentation for distribution to current and potential clients
- Selected Transaction Experience:
 - Issuer #1 Special Tax Bonds
 - Reviewed the credit and pricing spreads of comparable non-rated issues in order to develop initial pricing assumptions
 - Collaborated with the district's municipal advisor to achieve best outcome for the district
 - Issuer #2 General Obligation Bonds
 - Worked with Middle Market Bank's underwriting desk to implement unusual structuring that helped lower interest rates from preliminary to final pricing
 - Collaborated with financing team to ensure timely and accurate completion of the Official Statement and related closing documents
 - Issuer #3 General Obligation Bonds
 - Developed proposal that contributed to winning the deal, beating out lower bids
 - Performed tax rate analysis to facilitate structuring of the bonds, leaving room in the tax rate for future issuances
 - Performed bond pricing analysis and document review, contributing to the successful closing of the bonds

Investment Banking Summer Analyst, Public Finance

2 years ago

- Supported managers by creating financial analyses, memos, and pre-pricing books for over 50 issuers
- Researched municipal issuers, their financial conditions, capital needs, and revenue sources

Boutique Investment Bank

West Coast

Investment Banking Winter Analyst, TMT

2.5 years ago

- Worked directly with senior bankers in the evaluation of companies and preparation of transaction documents
- Created comprehensive industry landscapes and company profiles using industry research and financial models
- Contributed to the preparation of CIMs and creation of presentation decks
- Sourced potential buyers and acquisition targets for firms in sectors such as gaming and media

EDUCATION

Top 5 Public School

West Coast

BA in Economics, BS in Engineering

Last Year

- **GPA:** 3.20; **SAT:** High/2400 (Reading: XX; Math: XX; Writing: XX)
- **Honors:** Dean's Honors List, Other Academic Award

SKILLS, CERTIFICATIONS, & ACTIVITIES

Skills: Bloomberg, SDC, Capital IQ, DBC Finance, MS Office Suite

Certifications & Training: SIE Exam, Series 53, Series 60, Series 62, Relevant classes with energy and industrials focuses

Activities: Healthcare Company Case Competition (*1st Place*); Other Healthcare Case Competition (*3rd Place*)