

John Doe

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EDUCATION

State University - State Business School | Townsville, ST

Bachelor of Science, Finance | GPA: 4.0/4.0

Concentration in Real Estate

- Real Estate Club
- Graduate Level: Real Estate Finance and Investments

Expected Month year

Smallville University – Smallville Business School | Smallville, ST

Bachelor of Science, Finance | GPA: 4.0/4.0

Attended year - year

FINANCE EXPERIENCE

Real Estate Transaction Analyst

Growth Stage Real Estate Investment Firm

Townsville, ST

Month year – year

- Develop pro forma models and income/cash flow statements of property acquisitions, ensuring that investments meet the required IRR, debt service coverage ratio, levered return (cash-on-cash), and pose no inherent risks.
- Conduct sensitivity analysis on investment properties to forecast future business conditions, allowing for proper budget adjustment or rental rate increase where necessary to meet monthly goals.
- Collaborate with VP and CIO to quickly convert leads in the deal pipeline while analyzing client financial data to determine the risk level of a potential investment.

Commercial Real Estate Analyst

Commercial Real Estate Brokerage & Advisory Firm

Townsville, ST

Month year - Month year

- Conducted discounted cash flow analysis, analyzed and projected pro forma models and income/cash flow statements, and utilized sales comparables and cap rates to value commercial investment opportunities.
- Assisted in deal sourcing and producing pitch books/offering memoranda for banks, private equity partners, and other high net worth clientele, ultimately leading to the successful completion of three transactions worth over \$7,000,000.
- Improved residential property deal sourcing campaign output in first week through the use of personalized mail merge, leading to a 50% increase in deal sourcing efforts.
- Utilized Excel functions such as VLOOKUP, pivot tables, and other filters routinely to quickly organize and locate important data on clients and properties, saving associates hours previously spent on manually searching for data.

Portfolio Manager

Family Portfolio Management

Townsville, ST

Month year - Present

- Actively manage \$65k+ portfolio of stocks, options, and cash through semi-aggressive credit spreads and covered call strategies on low volatility companies, taking into account simple moving averages, standard deviations, and the “Greeks” to select option strike prices with the highest return and lowest risk exposure.
- Yielded average returns of 32% on invested capital from 2015 to Q4 2018.
- Most successful investments include: MSFT (+52%) and FB (+1,084%, put options), which was achieved through short puts on FB’s 2018 third quarter earnings announcement.

EXTRACURRICULAR EXPERIENCE

Vice President and Portfolio Manager

Student Managed Fund Club

Smallville University

Month year – Month year

- Managed mutual fund consisting of stocks from the S&P 500 valued at over \$20,000, which yielded returns of 13%.
- Performed technical analysis and stock valuation through the use of stock graphs, alpha, beta, EPS, and P/E ratio on a weekly basis.
- Constructed and presented PowerPoint presentations to club members pertaining to the performance of the mutual fund, ways to increase returns, stock valuation, and monthly goals, which led to increased club attendance and participation.

Equity Research Analyst

Student Managed Fund Club

Smallville University

Month year – Month year

- Performed market, equity, and economic research to utilize in the composition of magazine articles on an array of topics, including stock reports, trading strategies, and basic investment knowledge.
- Delivered hundreds of magazine copies to approximately 20 high schools in three different states to promote education and the study of business in secondary school.

Finance Chair

Fraternity

State University

Month year – Month year

- Oversaw fraternity funds and controlled master budget, including budgets for housing, fundraising, and other activities.

RELEVANT COURSEWORK

Graduate Program Class: Real Estate Finance, Investments, and Development, State University

Semester year

- Financial modeling, discounted cash flow and NPV analysis, IRR, levered vs. unlevered cash-on-cash return, sales/market comparison analysis, cost approach analysis, cap rates, Gordon Model, development/feasibility case studies, pro forma modeling, CMBS analysis, debt and private equity, REIT framework.

SKILLS

Computer: Microsoft Excel (Advanced), Word, PowerPoint, Outlook, SPSS, Adobe Photoshop, HTML, SQL, JavaScript, Java

Leadership: Ice hockey and soccer team alternate captain/captain

Former financial and managerial accounting tutor