**First and Last Name**

Phone Number | Professional Email | LinkedIn URL

**EDUCATION:**

**Bachelor of Business Administration** May 2023

*Stetson University, DeLand, FL*

Major: **Finance** | Overall GPA: **3.71** | Major GPA: **3.83**

**RELEVANT EXPERIENCE:**

**Manager (Growth Fund Portfolio Team Member Aug 2020 - Present)**Aug 2021 - Present

*Roland George Investments Program, Stetson University, DeLand, FL*

* Coordinate trustee meetings and lead discussions on performance of assets in $3.5MM stock/bond portfolio
* Conduct various financial valuation models to assess fair value of equity and fixed income securities
* Generate reports explaining rationale behind personal investment recommendations
* Utilize multiple valuation programs including Morningstar Direct, Bloomberg Terminal, and Thompson Reuters Baseline
* Adhere to CFA Institute code of ethics and standards of professional conduct

**Investment Banking Summer Analyst**  May 2020 - Aug 2020

*C. W. Downs & Co., Orlando, FL*

* Supported senior bankers by providing determinant data and preparing deliverables for mandates primarily in entertainment, aerospace, and healthcare sectors
* Identified potential corporate and financial buyers and sellers for multiple buy-side and sell-side mandates
* Researched and analyzed precedent investment transactions and comparable companies to evaluate trends, opportunities, and valuations

*Selected Transaction Experience:*

* Buy-side mandate for producer of high-performance materials with $300 million in revenues
* Private placement for Brazilian healthcare company seeking $15 million in equity capital
* Mandate for client seeking to spinoff aerospace machinery division generating $43 million in revenues

**Portfolio Analyst** May 2019 - Aug 2019

*Meridian Capital LLC, Durham, NC*

* Developed client presentations through industry research, and analyzing pension funds and real estate investment trusts
* Authored qualitative and quantitative market analyses to evaluate overall portfolio returns and viable alternative investment vehicles to increase returns
* Actively participated in weekly status meetings to review current client projects

**LEADERSHIP:**

**Student Peer Instructor (SPI)**Jan 2020 - May 2020

*Office of Academic Success, Stetson University, DeLand, FL*

* Selected as SPI for financial accounting course based on strong academic performance and personal integrity the previous semester
* Attended classes, took detailed notes, and published for benefit of all students in course
* Scheduled and led weekly content review and exam preparation sessions for students

**COMMUNITY SERVICE:**

**Habitat for Humanity** Jan 2020 - Present

*Volunteer, DeLand, FL*

* Renovate houses, fostering community engagement through teamwork, generosity, and leadership

**Neighborhood Center of West Volusia** Aug 2019 - Present

*Volunteer, DeLand, FL*

* Tutor children after school at community shelter to assist individual with exceeding academic goals