

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