**Student Name**

(555) 555-5555 [student@stetson.edu](mailto:student@stetson.edu) LinkedIn URL

**EDUCATION:**

**Stetson University, DeLand, FL**

**Bachelor of Business Administration** May 2023

Major: Finance

Overall GPA: **3.71** Major GPA: **3.83**

**RELEVANT EXPERIENCE:**

Roland George Investments Program, Stetson University, DeLand, FL

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

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

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

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

* 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

Meridian Capital LLC, Durham, NC

**Portfolio Analyst** (summer) 2019

* 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 possible alternative investment vehicles to increase returns
* Actively participated in weekly status meetings to review current client projects

**LEADERSHIP:**

Office of Academic Success, Stetson University, DeLand, FL

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

* 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,** DeLand, FL

*Volunteer*  2020 - Present

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

Neighborhood Center of West Volusia, DeLand, FL

**Volunteer**  2019 - Present

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