**Sally Stetson**

School Address: Street Name Unit #, City, State Zip

Permanent Address: Street Name, City, State Zip

(555) 555-5555 | sally@stetson.edu

**EDUCATION:**

**Stetson University**, **School of Business Administration,** DeLand, FL

Bachelor of Business Administration Spring 2018

Major: Finance

Overall GPA: 3.71 Major GPA: 3.83

**RELEVANT EXPERIENCE:**

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

*Manager (Spring 2017)/Growth Fund Portfolio Team Member* Fall 2016-Present

* 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

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

*Investment Banking Summer Analyst* Summer 2017

* 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 2016

* 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)* Spring 2016

* Selected as SPI for financial accounting course based on strong academic performance 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*  Fall 2015-Present

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

**Neighborhood Center of West Volusia ,** DeLand, FL

*Volunteer* Fall 2014-Present

* Tutor children after school at transitional shelter for men, women, and families