

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