

Name

Address | City, State Zip Code
Phone number | email

Education

UNIVERSITY OF CALIFORNIA, SANTA BARBARA

Santa Barbara, California

Bachelor of Arts in Economics & Accounting

Expected June 2014

- **Cumulative GPA:** 3.89 / 4.00, **Major GPA:** 3.92 / 4.00, **ACT:** 32 / 36
- **Honors:** College of Letters & Science Honors Program, Dean's Honor Roll
- **Relevant Coursework:** Financial Accounting, Financial Statement Analysis, Microeconomic Theory, Macroeconomic Theory, Managerial Accounting, Corporate Finance, Econometrics, Business Writing

Work & Leadership Experience

[Company Name]

City, State

Investment Banking Analyst Intern

March 2012 – Present

- Supported M&A advisory and merchant banking teams serving middle-market infrastructure services companies
- Performed valuation analysis utilizing comparable companies, precedent transactions and discounted cash flow models
- Screened for client acquisition targets, strategic buyers, channel partners and financial sponsors using Capital IQ
- Produced weekly and quarterly infrastructure valuation reports that included comps, transactions and industry analyses
- Completed *DealMaven* Level 1, an online financial modeling training program, building a detailed operating DCF
- **Selected Experience:** Principal investor and advisor for an early-stage geospatial infrastructure software (GIS) SaaS company, assisting with financial modeling, industry analysis, channel partners and capital acquisition
 - Performed qualitative analysis on drivers for increased GIS spending in the electric & gas space with a focus on DIMP regulations issued by PHMSA
 - Executed competitive analysis with a focus on current GIS offerings for utilities across infrastructure end markets

[Student Club Name]

City, State

President

December 2011 – Present

- Ran a club dedicated to educating students about finance and skills required to attain careers on Wall Street
- Presented on topics within finance such as investment banking, private equity, hedge funds and current events
 - Presented on technical aspects including financial accounting and discounted cash flow valuations
- Coordinated presentations by investment banking and private equity professionals on various topics within finance
- Mentored younger members and worked to develop first-time internship opportunities within investment banking

[Company Name]

City, State

Portfolio Manager

January 2012 – Present

- Co-managed a \$70,000 fund that invests a portfolio of securities on behalf of the XXXXXXXXXXXXXXXXXXXX
- Identified undervalued securities through a top-down macroeconomic approach and fundamental analysis
- Educated senior and junior analysts on capital markets, stock fundamentals and macroeconomic trends

[Company Name]

City, State

Corporate Sponsorship Intern

January 2011 – March 2012

- Worked with athletic partnerships and corporate development personnel at thirty universities across the nation
- Assisted with sales aspects focusing on lead generation within the discretionary spending and transportation sectors
- Created tailored sponsorship pitch books for prospective sponsors highlighting growth opportunities

Activities & Interests

- **Activities:** Four years of varsity lacrosse, Team Captain; surfing, deep sea fishing and snowboarding
- **Technical Skills:** Capital IQ, Thomson One Analytics, Morningstar, Salesforce
- **Community Service:** Teen Volunteers in Action, Homes for Hope, Goleta Valley Beautiful