

Adelae J. Chierici

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EDUCATION

Georgetown University (McDonough School of Business) – Washington, DC

Expected Graduation: May 2029

Bachelor of Science in Business Administration | Finance and Management

Cumulative GPA: 3.95/4.0

Awards/Accomplishments: Division-I Field Hockey Athlete

London School of Economics– London, UK

June 2026 - July 2026

Coursework: Microeconomics

Moorestown High School – Moorestown, NJ

Graduated: June 2025

High School Diploma

Cumulative GPA: 4.4/4.0 | Unweighted: 4.0/4.0

PROFESSIONAL EXPERIENCE

MAP x Morgan Stanley Remote

03/2026 – Present

Spring Investment Banking Fellow

- Selected as 1 of 50 NCAA athletes nationwide (10% acceptance rate from 500+ applicants) for a MAP Fellowship focused on Investment Banking career preparation
- Advanced to the Playoffs, earned **5-Star Status**, and received an automatic bid to MAP's 2026 Pro Bowl Games, MAP's highest distinction for technical performance, professionalism, and recruiting readiness.
- Built technical investment banking skills through training with MAP's banking partners, gaining exposure to accounting, enterprise value, valuation, DCFs, and M&A.

Edmund Optics Barrington, NJ

Accounting Intern

06/2025 – 08/2025

- Supported accounts payable/receivable, month-end close, journal entries, and account reconciliations.
- Utilized accounting software to maintain accurate financial records and improve data-entry efficiency.

S & C Painting Moorestown, NJ

Personal Assistant

05/2026 – 08/2026

- Managed scheduling, customer communications, and daily administrative operations.
- Assisted with invoicing, expense tracking, estimates, and payment coordination.
- Coordinated employees, supplies, and project logistics to keep jobs on schedule.

UPRISE Field Hockey Club Voorhees, NJ

Field Hockey Coach

06/2022 – Present

- Designed and led training programs focused on player development, teamwork, and competitive performance.
- Coordinated practices and communicated with players, parents, and coaching staff regarding development and team expectations.

EXTRACURRICULARS

Georgetown University Athletics Washington, DC

Division-I Field Hockey Player

08/2025 – Present

- Competed as a student-athlete on Georgetown's Division-I Field Hockey team, balancing rigorous academic coursework with high-level athletic training and competition.
- Demonstrated commitment to team culture and performance through daily practice, film, and strength and conditioning programs.

Moorestown Recreational Department Moorestown, NJ

Field Hockey & Lacrosse Coach Volunteer

08/2021 – 06/2025

- Developed practice plans and instructed athletes on fundamental techniques and strategies for competitive play.
- Organized team events fostering camaraderie and sportsmanship, while evaluating player performance and providing constructive feedback for continuous improvement.

Moorestown High School Moorestown, NJ

Peer Tutor

09/2023 – 06/2025

- Developed individualized lesson plans to enhance student understanding and engagement while adapting instructional methods.
- Facilitated group discussions to promote collaborative learning and critical thinking; mentored junior tutors on effective instructional strategies.

Georgetown University – Research Project Washington, DC

"Beyond the Game: The Lasting Career Benefits of College Athletics"

Fall 2025

- Examined how collegiate athletics develop workplace-relevant soft skills through a semester-long research collaboration.
- Analyzed peer-reviewed research, labor-market data, and employer perspectives to assess impacts on hiring, compensation, leadership attainment, and long-term well-being.

SKILLS & INTERESTS

Skills: PowerPoint, Financial Analysis, Data Analysis, Public Speaking, Team Leadership

Interests: Investing, Entrepreneurship, Field Hockey, Skiing, Yoga

Adithya (Adi) Venkataraghavan

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EDUCATION

Cornell University

Bachelor of Arts in Economics & Mathematics | Minor in Data Science

Cumulative GPA: 3.7/4.00

Ithaca, NY

Expected Graduation: May 2029

PROFESSIONAL EXPERIENCE

AFBI Hedge Fund

2026 Hedge Fund Summer Analyst

New York City, NY

May 2026 – Aug 2026

- Analyzed cross-asset macro trends, alternative datasets and quantitative trading signals across 3+ global markets, supporting portfolio managers through macroeconomic research, risk monitoring and FX strategy analysis to learn more about modeling trends.
- Engineered and utilized FX algorithmic trading models in MATLAB with walk-forward optimization across 1,300+ days of currency pair data, producing 3D parameter space analysis to identify robust signal zones and optimizing the Sharpe and Sortino ratio
- Built and refined a 15,000+ record investor prospect database down to 100+ high-fit targets using AUM, mandate, and strategy-fit criteria, manually verified top candidates before presenting findings to senior leadership to support capital-raising outreach.

Morgan Stanley

MAP Investment Banking Fellow

Remote

Apr 2026 – Jun 2026

Selected Transaction Experience

- Selected as 1/75 NCAA athletes (~20%) to lead the full Execution Phase for a 5-person deal team, directing valuation analysis, precedent transactions and risk assessment to recommend Alkami Technologies as a strategic fintech SaaS acquisition live to MS.
- Analyzed 3 precedent fintech SaaS acquisitions totaling \$4.4B+ in enterprise value, benchmarking 5.5x–29x EV/Revenue multiples/margin expansion drivers to strengthen valuation support for Alkami & improve the quality of final recommendation in our pitch.
- Built valuation and risk framework using 5+ institutional sources, including PitchBook, Capital IQ and Alkami 10-K filings, assessing SG&A leverage, regulatory exposure, and competitive positioning to support a more defensible final recommendation for MS.

LEADERSHIP & COMMUNITY DEVELOPMENT

Cornell Men's Varsity Golf | Ranked D1 Golfer

NCAA Student-Athlete

Ithaca, NY

Aug 2025 – Present

- Built on a 2-year captaincy leading an 18-player varsity golf team at Lynbrook High School and contributing to 10+ match victories, carrying forward leadership/accountability/competitive preparation skills into NCAA Division I tournament environments at Cornell
- Competed in all 5 Ivy League tournaments as a freshman ranked within the top 4% of national Rolex Junior Golf standings, balancing 25+ hours/week of training and travel while strengthening performance consistency under high-pressure competitive environments
- Won the San Jose City Professional Championship in a 60-player field with a two-day score of -3, outperforming collegiate and amateur competitors while reinforcing composure, strategic execution and high-pressure decision-making in tournament settings

Young Professional Mentorship Program | NGO

Program Leader (Seasonal)

Remote

Jun 2023 – Present

- Lead mentorship and educational programming for 50+ underprivileged Ugandan children ages 5–16, coordinating cross-functional outreach initiatives/seminar development that strengthened community engagement + long-term educational accessibility for students
- Raised \$5K+ through targeted GoFundMe campaigns supporting technology access for underserved students, partnering with 3+ nonprofit leaders and global advocates to improve operational support and expand program impact across participating communities
- Partnered with Agnes Igoye and 3+ international nonprofit stakeholders to coordinate mentorship initiatives and educational outreach efforts, strengthening program visibility and improving cross-functional + organizational collaboration across global volunteer teams

Make-A-Play Foundation

Professional Development Fellow

Remote

Mar 2026 – Apr 2026

- Selected as 1 of 50 athletes nationwide from 500+ applicants (10% acceptance) for a Morgan Stanley-sponsored investment banking fellowship, completing a 3-week program with 20+ hours of targeted behavioral interview preparation for a career in high-finance
- Competed against 376 fellows through 3 mock interviews, delivering structured responses across leadership, teamwork and conflict scenarios while improving executive presence, composure and communication in fast-paced/high pressure interview environments
- Presented the final acquisition recommendation live to Morgan Stanley bankers in a team of five, defending valuation assumptions and deal rationale under real-time questioning, earning the top score among all participating deal team in the Make-A-Play Foundation.

SKILLS & INTERESTS

Awards: AP Scholar with Distinction, AJGA Golf Scholastic All American Award, Frederick Douglass & Susan B. Anthony Award

Skills: Microsoft Office Suite (Beginner), Golf (+2.5 Handicap), Knowledge of Python Coding Language

Languages: English (Native Proficiency)

Organizations: Make-A-Play Foundation, Cornell University Varsity Men's Golf

Interests: Powerlifting, Golf, Hiking, Traveling, Basketball, Mathematics, Cricket, Tennis, Stock and FX Trading

Adya Kadam

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EDUCATION

University of California, Berkeley, College of Engineering

B.S. Electrical Engineering and Computer Science

GPA: 3.71 | SAT: 1520

Expected May 2028 Graduation

Courses: Data Structures, Multivariable Calculus, Linear Algebra, Differential Equations, Economics

EXPERIENCE

Spring Investment Banking Fellow

Remote

MAP x Morgan Stanley

March 2026 – August 2026

- Stripe — Global Payments & Financial Infrastructure Platform (Tech M&A / Strategic Advisory Simulation) ○
 - Conducted comparable company analysis on 2 fintech precedent transactions for the deal team of 5, totaling \$19B+ in enterprise value, benchmarking 9.8x–25x EV/Revenue multiples, payments infrastructure trends & international expansion dynamics to develop a final acquisition thesis
 - Developed financial and regulatory analysis using 5+ institutional and industry sources, evaluating sovereign-cloud compliance, payment-processing scalability, and cross-border transfer risk to support a more defensible investment recommendation for MS

Linux Foundation | Senior Strategy Consultant

Remote

MAP x Morgan Stanley

March 2026 – August 2026

- Translated client scope for Tazama, a Gates Foundation-backed financial crime platform, into a structured 10-week workplan across fraud typology analysis, regulatory mapping, and market readiness modeling, managing consultant assignments to deliver findings to Linux Foundation and Tazama stakeholders
- Built a repeatable market readiness framework, scoring countries like Pakistan, Philippines, and Thailand across regulatory maturity, market demand, and adoption signals, enabling Tazama to prioritize deployment markets in Asia and serve as a reusable model for future territories

PROJECTS

Founding Full-Stack Software Engineer

Berkeley, CA

Made By Adya (madebyadya.com)

May 2026 – Present

- Built and launched a full-stack e-commerce platform using Next.js, Supabase (PostgreSQL), Stripe, and Vercel, leveraging AI-assisted code generation to accelerate development, generating \$500+ revenue.
- Built a self-service analytics dashboard tracking order, inventory, and user data to drive ROI-based product decisions and inform marketing strategy

Analytics Engineer

Fremont, CA

Cal Field Hockey Win Predictor

June 2026

- Built a predictive model on 11 seasons / 186 games of performance data (Python, scikit-learn), applying Logistic Regression and Decision Tree classification to identify the strongest statistical drivers of match outcomes at 71% accuracy
- Developed a real-time forecasting tool translating model outputs into actionable performance insights, mirroring the quantitative signal-testing used in investment analysis

ACTIVITIES

Student-Athlete

Berkeley, CA

NCAA Division I Field Hockey

August 2025 – Present

- Competed in ACC as a freshman, contributing to a national top-25 ranking and an ACC tournament appearance, training 20+ hours weekly, and traveling nationwide for competitions
- Collaborated with 26 teammates in fast-paced settings to build adaptability, accountability, and execution

Part-Time Field Hockey Coach

San Jose, CA

NorCal Impact Field Hockey

December 2022 – Present

- Structured training programs for 40+ athletes to enhance gameplay, skills execution, and teamwork
- Tailored feedback and guidance to players of all skill levels to improve confidence and performance

SKILLS & INTERESTS

Technical Skills: Advanced PowerPoint, Excel, Project Management, Java, JavaScript, MATLAB, Python, [Next.js](https://next.js.org/), pandas

Languages: English, Spanish (California Seal of Bilingual Proficiency), Marathi

Interests: Crochet, Spanish, Marathi, Sewing, Street Food Night Markets, Thrifting, NYT Games, Clash Royale

Alex T. Nguyen

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EDUCATION

Washington University in St. Louis

Bachelor of Science in Finance, Financial Engineering

St. Louis, MO

Expected Graduation: May 2029

- **Cumulative GPA:** 3.74/4.0
- **Relevant Courses:** Microeconomics, Managerial Statistics, Financial Accounting, Business Management
- **Organizations:** Varsity Swim & Dive Team, Student Investment Fund, Swim & Dive Social Committee
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (*to be completed by June 2026*)

PROFESSIONAL EXPERIENCE

Morgan Stanley

MAP Investment Banking Fellow; Team Captain

Remote

Mar 2026 – Present

Selected Transaction Experience

- Heidi Health — *AI Clinical Documentation & Workflow Automation Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/10 captains from 376 NCAA athletes (top 2%) to lead a 5-person deal team through 6 weekly workstreams to evaluate software/AI-driven acquisition targets for a prospective PE client and deliver a live investment recommendation on 6/8
 - Sized Heidi Health's market opportunity using ~\$730–820B TAM, ~\$429B SaaS SAM and ~\$222B U.S. SOM, synthesizing 4+ sources to evaluate growth across generative AI, cloud infrastructure and cybersecurity, grounding the team's investment thesis
 - Assessed Heidi Health's positioning against 4+ competitors including Abridge, Nabla and Suki AI, analyzing differentiation, cost structure and scalability risks while developing mitigation strategies around pricing and conversion that defended our thesis

Washington University in St. Louis | Student Investment Fund

Junior Analyst

St. Louis, MO

Jan 2026 – Present

- Conducted in-depth fundamental research on 10+ publicly traded 'TMT' companies, analyzing business models, competitive positioning and financial statements to generate actionable investment insights that strengthened stock selection across the fund
- Delivered 3+ equity research pitches to student analysts and portfolio managers, synthesizing valuation work, catalysts and risks into concise investment theses that guided discussions and supported higher-conviction investment recommendations during meetings
- Monitored 20+ macroeconomic trends, sector news items and earnings releases across semiconductors, SaaS and digital media, identifying opportunities and assessing portfolio positioning that improved market awareness and coverage across TMT sub-sectors

Manor Country Club

Lifeguard

Rockville, MD

Aug 2022 – Aug 2025

- Monitored aquatic facilities and enforced safety protocols for a private member pool serving 200+ daily guests, maintaining a secure environment that supported positive member experiences and reliable day-to-day pool operations throughout each season from '22-25
- Responded to 5+ emergency situations including swimmer distress and minor injuries, administering CPR and first aid while coordinating with management to ensure rapid, effective resolution, clear communication and strong guest confidence under pressure
- Conducted daily pool inspections and 3+ chemical tests per shift, verifying water quality and equipment compliance with Maryland health standards while documenting findings and escalating issues that improved facility readiness and operational accountability

LEADERSHIP & COMMUNITY DEVELOPMENT

Washington University in St. Louis | Swimming & Diving Team

NCAA Student-Athlete

St. Louis, MO

Aug 2025 – Present

- Built on prior success as a 3-time USA Swimming Scholastic All-American by competing in multiple NCAA swim meets each season across freestyle, distance, backstroke and IM events, posting 4 personal bests at the Phoenix Fall Classic and supporting team success
- Dedicate 20+ hours weekly to team practices, strength training and meetings, sustaining consistent performance, accountability and reliability as a contributing member within a high-performance collegiate swim environment throughout the academic year

Washington University in St. Louis | Social Committee

Swim & Dive Social Committee Member

St. Louis, MO

Aug 2025 – Present

- Planned and executed 5+ team social events including dinners, service outings and bonding activities, managing end-to-end logistics that strengthened team culture, engagement and relationships across multiple class years (c/o 2026-29) throughout the academic year
- Distributed communications to a 30+ member team while coordinating with 3+ athletic department staff and tracking 10+ budget expenditures, ensuring organized execution, financial accountability and high-quality programming for student-athletes across WashU

Richard Montgomery High School

Varsity Swim & Dive Team Captain

Rockville, MD

Aug 2024 – Jun 2025

- Directed daily practices for a 40+ athlete varsity roster while establishing standards of discipline and competitive excellence across training sessions & championship meet preparation cycles, elevating consistency, accountability + overall swim/dive team performance
- Mentored 15+ underclassmen in stroke technique, race strategy and mental conditioning while designing pre-meet warm-up protocols across 10+ events, contributing to stronger split times, personal bests, relay performances and improved scoring at major competitions

NON-TECHNICAL SKILLS & INTERESTS

Skills: Financial statement analysis, investment memo writing, stock pitch presentation, team leadership, time management

Programs: Excel (developing), Java (developing)

Interests: Competitive swimming, investment research, music

Alexandra M. Duff

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EDUCATION

Georgetown University

Bachelor of Arts in International Political Economics

Washington, DC

Expected Graduation: May 2029

- **Cumulative GPA:** 3.515/4.0 | **SAT:** 1510
- **Relevant Courses:** Intense First Level Chinese II, Principles of Microeconomics, Principles of Macroeconomics, Political & Social Thought, Maps of the Modern World, ProSeminar: The Jewish Century, The Problem of God, Writing & Culture
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 07/2026)

PROFESSIONAL EXPERIENCE

Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Jul 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Command Zero — *Agentic AI Security Operations Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/75 NCAA athletes (~20%) to lead the Planning Phase for a Morgan Stanley-style case, analyzing Command Zero by structuring 5+ financial assumptions tied to agentic AI adoption, enterprise cybersecurity demand and long-term SaaS trends
 - Built 4+ banker-style exhibits evaluating Command Zero's AI-native threat detection platform, funding profile and projected enterprise growth strategy, establishing frameworks around burn rate, margin trajectory and long-term value creation potential
 - Defined 5+ diligence priorities for a 5-person deal team, including pilot-to-contract conversion, competitive differentiation, infrastructure spending & fundraising requirements, enabling downstream workstreams to stress-test assumptions/refine thesis

Childcare | Private Au Pair Service

Nanny

Newtown Square, PA

May 2025 – Aug 2025

- Provided full-time childcare for 2 families with children ranging from 9 months to 10 years old, managing daily routines, meal preparation and age-appropriate activities while ensuring safety, engagement & consistent household organization throughout summer
- Supported 5+ daily responsibilities including transportation, scheduling and household coordination, building trust with families through reliable communication, adaptability and attentive care across fast-paced childcare environments with changing family needs

Urban Outfitters

Retail Sales Associate

King of Prussia, PA

Feb 2024 – Aug 2024

- Delivered customer-focused service within a fast-paced retail environment, assisting 25+ customers daily with product selection, transactions and store navigation to improve customer satisfaction and overall shopping experience during high-traffic sales periods
- Maintained visual merchandising standards and supported daily store operations alongside 5+ team members, strengthening teamwork, communication and operational efficiency while contributing to positive customer interactions and sales support efforts

LEADERSHIP & COMMUNITY DEVELOPMENT

Georgetown University | Women's Varsity Field Hockey

NCAA Division I Student-Athlete

Washington, DC

Aug 2025 – Present

- Compete as a D1 student-athlete at Georgetown while balancing 20+ hours weekly of training, travel and competition, building on prior experience as a nationally ranked high school athlete and multi-time academic and athletic honoree across multiple environments
- Collaborate with 20+ teammates to optimize on-field communication and execution, strengthening team cohesion, accountability and performance outcomes across practices, film sessions and competitive match play against nationally ranked opponents during season

Schoolhouse.World

Volunteer Tutor

Remote

Sep 2023 – Aug 2025

- Provided free weekly SAT tutoring in math and English to students online, creating customized lesson plans that improved students' level of preparation, confidence & understanding across multiple testing subjects and skill levels for a diverse group of student learners
- Hosted weekly 90-minute Zoom sessions for groups of 10–15 students, strengthening communication, public speaking and instructional skills while adapting lesson delivery to meet diverse academic needs effectively across varying testing experience levels

Jewish Federation of Philadelphia Mitzvah Food Pantry

Volunteer

Philadelphia, PA

Jun 2023 – Jun 2024

- Delivered 15+ food bags weekly across the Philadelphia area, supporting community food accessibility efforts while strengthening reliability, organization and service-oriented communication through consistent volunteer engagement with local families & individuals
- Planned weekly delivery routes and coordinated transportation across West Philadelphia neighborhoods, improving efficiency/time management/logistical organization while ensuring timely deliveries to community members in need during recurring volunteer efforts

Centrella's Deli & Private Contracts

Hot Chocolate Bomb Vendor

Havertown, PA

Dec 2020 – Mar 2024

- Created and sold hot chocolate bombs through community deli partnerships and private contracts, managing 25+ seasonal orders while strengthening entrepreneurship, customer service and small-business operational skills during recurring holiday sales cycles
- Organized production timelines, processed customer requests and coordinated fulfillment for large orders, maintaining reliability, efficiency and product quality throughout high-volume winter sales periods and holiday cycles across multiple distribution channels

NON-TECHNICAL SKILLS & INTERESTS

Skills: Microsoft Word, Excel, PowerPoint, Academic research & analytical writing, Cross-cultural communication, and Time management

Languages: German, Mandarin, French

Alexis L. Li

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EDUCATION

Johns Hopkins University | Krieger School of Arts and Sciences

Baltimore, MD

Bachelor of Arts in Economics & Molecular and Cellular Biology

Expected Graduation: May 2029

- **Cumulative GPA:** 3.76/4.0 | Dean's List – Fall 2025, Spring 2026
- **Courses:** Elements of Microeconomics, Elements of Macroeconomics, Introductory Chemistry, Calculus I

The Chapin School

New York, NY

Cumulative GPA: 4.0/4.0 | **ACT:** 34

Sep 2011 – Jun 2025

- Health & Wellness President (4x elected representative); restructured student government via inaugural council of all-school presidents
- Varsity Soccer Captain (2x elected); All-Star (2022) and Coach's Choice Award (2022), led the team to NAIS semifinals
- Editor-in-Chief of *Wheel Magazine*; led a 6-member editorial team and published a 100+ page issue for the entire high school

INTERCOLLEGIATE SPORTS

Johns Hopkins University Varsity Fencing Team, NCAA Student-Athlete Saber Fencer

August 2025 – Present

- A24 Rated; ranked top 100 nationally in Junior (#89) and Cadet (#78) Women's Saber; All American & All Academic First Team
- Training 15+ hours weekly while balancing a rigorous academic schedule

PROFESSIONAL EXPERIENCE

Ad x Astra, Intern

May 2026 – Present

- Created forward-looking analytical frameworks using causal factors and drivers to backtest and validate proprietary investment theses
 - Conducting commodity market research in an opaque asset class to assess and predict its cyclical behavior
 - Translating and analyzing historical trades in public venture investments to create a forward-looking optimization framework by evaluating trade size rationale, entry/exit logic, tax consequences, and macro environment for each position
- Co-developing a private-equity style rating methodology leveraging LLMs to accelerate build velocity from concept to product
- Managing \$100k discretionary portfolio based on previously developed investment frameworks

Bank of America, Make a Play Formula 1 Investment Banking Fellow

Jan 2026 – Present

- Ranked top 1% of all fellows competing in Superday interviews and was selected to the Pro Bowl games, earning 5-star status
- Ranked 2nd of 675 participants in a case competition, advising a private equity client on Omada Health with a comprehensive pitch deck
 - Synthesized macro healthcare trends, including U.S. healthcare spend, projected medical costs, to strengthen investment thesis
 - Built banker-style planning snapshot evaluating Omada's ~20M covered lives against a ~154M commercially insured TAM and ~27% projected 3-year revenue CAGR, clarifying market runway, growth profile, and key expansion opportunities across GLP-1
 - Identified two core vulnerabilities, including unproven GLP-1 partnership monetization and low current penetration, while grounding projections in 2026E revenue and EBITDA benchmarks, strengthening the foundation for all future downstream work

Wall Street Internship Academy, Johns Hopkins University Fellow

Oct 2025 – Present

- Selected for a competitive finance preparation program providing technical training, industry immersion, and mentorship
- Chosen for the Fall 2025 NYC Wall Street Trek, engaging with alumni at 5+ major firms to learn about financial career trajectories

University of Minnesota, Colorectal Data Analysis Intern

Jun 2024 – Mar 2025

- Co-authored publication "[“Perioperative Nutrition Therapy to Optimize Colorectal Patient Outcomes”](#)" (2026) by extracting data from 75+ scientific papers, building study-characteristic tables and literature summaries to support structured analysis

CCRM Fertility Clinic, Intern

May 2025 – Jun 2025

- Shadowed board-certified endocrinologist observing egg retrievals and embryo implantations to understand clinical workflow

Babysitter

May 2026 – Present

LEADERSHIP & COMMUNITY DEVELOPMENT

The Child Mind Institute, Youth Council Member

Jun 2023 – Jun 2025

- Selected as 1 of 20 youth advisors at the Child Mind Institute, moderating high-profile panels featuring U.S. Surgeon General Vivek Murthy and Second Gentleman Douglas Emhoff while driving development of nationally distributed mental health resources

Stanford Stan-X Fly-Lab Program, Student Researcher

Sep 2023 – Jun 2024

- Engineered a novel *D. melanogaster* strain using Stanford's SX4 P-element adopted into Stanford's ongoing research pipeline
- Authored and presented a genetics research paper detailing enhancer mapping methodologies and identifying gene regulation patterns

SKILLS & INTERESTS

Clubs: Alpha Phi Fraternity, Smart Women Securities Analyst, AMA Nest Strategies Consulting Analyst, Investment Banking Workshop

Skills: Mandarin Chinese (Conversational), CPR Certified, Microsoft Office, Google Workspace

Interests: F1, Thrifting, Creative Writing (Poetry & Fiction), Traveling, Cooking, Reading, Piano

Amanda E. Park

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EDUCATION

Cornell University

Bachelor of Science in Applied Economics and Management

Ithaca, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 3.99 | **ACT:** 35
- **Honors/Awards:** NFHCA Scholar of Distinction, NFHCA National Academic Squad, Adventis Financial Modeling Level 1 Certification, Adventis Financial Modeling Level 2 Certification, Wall Street Prep Accounting & Financial Statement Analysis

PROFESSIONAL EXPERIENCE

Summit Real Estate

Sales Agent Summer Intern

Dallas, TX

Jun 2026 – Aug 2026

- Supporting commercial real estate brokers this summer by analyzing retail and investment opportunities, conducting market research & preparing client materials, gaining exposure to transactions across the platform with \$5.8B+ in completed deal volume
- Collaborating with 3 other team members to underwrite a theoretical multi-tenant property using leases and the county appraisal district, fill in financials to find current net operating income, and price the property to pitch both to the seller and potential buyers

UBS x MAP

MAP Investment Banking Fellow & Team Captain

Remote

Jun 2026 – Present

- Selected as 1/12 captains from 594 NCAA athletes (top 2.0%) through three rounds of interviews and weekly assignments to lead a 5-person deal team through 6 weekly workstreams, pitching an investment target for a hypothetical U.S. PE client live to UBS
- Demonstrating leadership, collaboration, and team-management skills to lead a deal team through completing a 12-slide pitch deck, 15-hour accounting course, 3 rounds of technical interviews, and presentation of our investment recommendation to analysts at UBS

Freelance Private Tutoring

Freelance Tutor

Dallas, TX

Sep 2023 – Aug 2025

- Tutored 5 students across elementary, middle, and high school mathematics by adapting instruction in algebra, geometry, and calculus, strengthening quantitative reasoning while helping students build confidence & improve academically through individualized learning
- Coordinated 20+ weekly virtual and in-person tutoring sessions by communicating with students, parents, and caregivers, creating personalized lesson plans and flexible schedules that strengthened organization while improving consistency and long-term progress

LoneStar Field Hockey Club

Coach

Dallas, TX

Aug 2022 – May 2025

- Coached a 20-player U12 field hockey team by leading weekly skill development, game strategy and sportsmanship instruction, fostering technical growth while creating a competitive environment that emphasized teamwork, confidence and player development
- Designed and led 3-hour weekly practices by organizing drills, small-sided games and competitive exercises alongside an assistant coach, strengthening player fundamentals while maintaining an engaging environment that encouraged their continuous improvement

Flower Child

Restaurant Waitress

Dallas, TX

Jun 2024 – Nov 2024

- Managed customer orders, food service, and opening and closing responsibilities across 4–5 weekly shifts by balancing competing priorities in a fast-paced restaurant, delivering attentive service while supporting efficient daily operations & positive guest experiences

LEADERSHIP & COMMUNITY DEVELOPMENT

Cornell University Field Hockey

NCAA Division I Student-Athlete

Ithaca, NY

Aug 2025 – Present

- Commit 20+ hours weekly to Division I field hockey practices, competition, travel, and film study while balancing a rigorous academic schedule, strengthening time management, discipline, and consistent performance in one of the nation's premier collegiate conferences
- Competed in 5 varsity games across forward and midfield, including an appearance against No. 2 North Carolina, while earning NFHCA Scholar of Distinction recognition, demonstrating adaptability, academic excellence, and high-performance under pressure

Banking at Cornell

Analyst

Ithaca, NY

Feb 2026 – Present

- Developed technical finance skills through 4+ hours of weekly investment banking training by building financial models, analyzing valuation methodologies and presenting stock pitches, strengthening analytical thinking while expanding knowledge of high-finance
- Collaborated with teammates to prepare 10+ presentation slides covering equity research, mergers and acquisitions, and current market news, strengthening communication and financial storytelling while delivering polished analyses during weekly meetings

Greenhill Student Council

Class Vice President, Student Body Secretary

Dallas, TX

Aug 2022 – May 2025

- Led weekly student council meetings by coordinating with faculty and student leaders, presenting updates to 500+classmates and organizing campus initiatives, strengthening leadership, public speaking, and collaboration across the broader school-wide community

NON-TECHNICAL SKILLS & INTERESTS

Skills: Drawing, Financial Modeling, Golf (Handicap: 13), Leadership, Problem Solving, Public Speaking, Statistics, Teamwork, Tennis

Interests: Arts and Crafts, Crime-Fiction Novels, Lifting, Musical Theatre, Pickleball, Running, Singing, Skiing, Travel

Andrew J. Turner

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EDUCATION

Carnegie Mellon University | Tepper School of Business

Pittsburgh, PA

BS in Business Administration | Concentration in Finance | Minor in Computational Finance

May 2029

- **Cumulative GPA:** 3.6/4.0
- **Honors / Awards:** Varsity Football (Quarterback), Goldman Sachs Possibilities Series, CMU Dual-Use Technology Summit
- **Relevant Courses:** Calculus, Statistics, Business Computing, Accounting, Microeconomics

PROFESSIONAL EXPERIENCE

Concurrent Investment Advisors

Tampa, FL

Operations Intern

May 2026 - July 2026

- Built an automated vendor management AI system to extract financial data from contracts, populating a user P&L calculator
- Led the first comprehensive update of Concurrent's 180+ vendor CRM, auditing and updating vendor data and agreements
- Collaborated with interns across departments to create and deliver a presentation outlining Concurrent's pitch to advisors

AJ's Courier Service

Columbia, SC

Founder and CEO

November 2021 - May 2025

- Founded and operated an independent medical courier business to ensure the secure delivery of life-saving medical devices
- Communicated with doctors in a 200 mile radius to ensure the rapid delivery of devices needed for emergency surgeries
- Tracked revenue, expenses, profit margins in order to monitor business performance and optimize operational efficiency

LEADERSHIP & COMMUNITY DEVELOPMENT

MAP x UBS

Remote

MAP Five-Star Investment Banking Fellow

June 2026 - Present

- Achieved "5-Star" status (top 2.5% of 594 NCAA student-athletes), selected for title sponsor-led IB technical bootcamps
- Modeled Celonis using \$626M revenue, \$700M net cash, and breakeven EBITDA before pitching to UBS IB directors

Carnegie Mellon | Private Equity & Venture Capital Club

Pittsburgh, PA

Vice President, Education

November 2025 - Present

- Evaluating case studies and alternative investment opportunities to lead club members through investment analysis
- Participated in structured walkthroughs of deal sourcing, due diligence, and valuation to build skills in investment analysis

Carnegie Mellon | Financial Analyst Student Training

Pittsburgh, PA

Financial Student Analyst

August 2025 - Present

- Completed analyst development program focused on financial modeling, valuation, and technical interview preparation
- Conducted equity and credit research through industry job simulations across IB, private equity, and private credit

Joseph Maley Foundation

Remote

Guest Speaker

January 2022 - Present

- Shared personal experiences with mild to moderate hearing loss to promote awareness and resilience among young students
- Delivered presentations and held Q&A sessions to share experiences as an athlete with hearing loss and promote optimism

SC-5 Congressional Representative Ralph Norman

Washington, DC

Shadow Experience

January 2020 - February 2020

- Engaged with Congressional representatives during a live House session to cast an informed vote on a proposed bill
- Shadowed Congressman Norman's team to learn how legislative offices operate and how public policy is developed

ATHLETICS

Carnegie Mellon | NCAA Varsity Football

Pittsburgh, PA

Quarterback

August 2025 - Present

- Developed time management skills through a 35+ hour weekly schedule including practice, games, lifting, film review
- Serve as an on-field leader responsible for play-execution, communication, and maintaining composure in high-stakes games

Hammond High School Football

Columbia, SC

Quarterback

August 2023 - November 2024

- Threw the game-winning touchdown in critical last-minute situations during both 2023 and 2024 state championship games
- Led my team to its 7th and 8th consecutive state championships; earned 2024 SCISA Offensive Player of the Year honors

Interests: AI, College Football, Cooking, History, Mathematics, Scuba Diving, Travel and Culture

EDUCATION

Massachusetts Institute of Technology (MIT) | Cambridge, MA
Bachelor of Science, Mathematics and Finance | GPA: 5.0/5.0

Aug. 2025 – June 2029

EXPERIENCE

MIT Laboratory for Nuclear Science | *Undergraduate Researcher* **Cambridge, MA** | Dec. 2025 – March 2026

- Built a Python data analysis pipeline to process large-scale experimental datasets, engineer features and generate automated statistical visualisations, improving the consistency and efficiency of preliminary research analysis.
- Developed a Monte Carlo-based calibration framework to quantify and correct measurement bias using event-level inverse-probability weighting, improving the reliability of downstream modelling.
- Implemented likelihood-based model fitting and diagnostic testing to evaluate parameter stability, identify correlated-variable risk, and propose a refined joint modelling approach.

MIT Sloan School of Management | *Undergraduate Researcher* **Cambridge, MA** | June 2026 – Aug. 2026

- Conducted qualitative analysis of organisational behaviour literature using structured coding methodologies to support an academic publication on workplace behaviour.
- Performed literature reviews, refined research codebooks, and reconciled inter-coder discrepancies to improve data quality, consistency and analytical reliability.
- Analysed coded datasets in Excel and communicated directly with Professor Basima Tewfik on coding methodology, discrepancies and research findings.

MAP x UBS | Investment Banking Summer Fellow **Remote** | May 2026 – Present

- Selected as 1 of 100 from 650+ NCAA athletes for MAP's Money Ball Fellowship sponsored by UBS, an intensive investment banking preparation programme focused on technical finance, valuation and private equity.
- Developed and defended investment recommendations through equity research, valuation and investment committee simulations covering SaaS businesses and cross-border private equity transactions.
- Participate in weekly Superday simulations including behavioural interviews, technical finance assessments and investment committee presentations evaluated by finance professionals and alumni.

Weatherbys Private Bank | *Data Analyst Intern* **London, UK** | July 2023

- Cleaned and analysed customer credit-card usage data in Excel for a product team, identifying usage trends to inform potential new card offerings.
- Summarised quantitative findings for product and risk stakeholders, highlighting target segments and feature opportunities to support decision-making.

LEADERSHIP & ACTIVITIES

Varsity Lightweight Crew Team | *Current MIT Division I Athlete* **Cambridge, MA / London, UK** | March 2022 – Present

- Train ~20 hours/week in a high-performance programme while balancing year-round competition with a full MIT academic course load.
- Compete at major regattas including Intercollegiate Rowing Association National Championships (3rd place LW V4+, 2026), Henley Royal Regatta, and Henley Women's Regatta (reaching quarter-final finishes in 2025 and 2026).
- Raced internationally and domestically (2022–2025), achieving 1st place at Ghent International Regatta (U19 4x, 2024) and Top 10 finishes at National Schools Regatta and British Rowing Championships.

Sloan Business Club (MIT) | *Executive Board Member* **Cambridge, MA** | Oct. 2025 – Present

- Selected as 1 of 25 from 400+ applicants and completed the club's Basic Education Program covering core finance, accounting, valuation and business fundamentals.
- Developed and presented an equity investment recommendation and consulting case, applying structured financial and strategic analysis to support clear recommendations.
- Elected to the Executive Board to lead recruitment for incoming cohorts, coordinating 300+ participant events, managing team workstreams and helping refine candidate selection criteria and evaluation processes.

Institute of Research in Schools (IRIS) Project | *Project Leader* **London, UK** | March 2022 – June 2024

- Led a multi-year predictive-modelling project on weather patterns and London air pollution, delivering a validated model and evidence-based conclusions.
- Analysed 10,000+ hourly air-quality data points from five Greater London monitoring stations using advanced Excel and introductory Python, producing cleaned datasets and outputs used in the final model.
- Presented findings to ~400 students and teachers at a national research conference and facilitated Q&A, resulting in three additional variables being incorporated into the final model.

SKILLS AND INTERESTS

Skills: Microsoft Excel, PowerPoint, Python, Jupyter, LaTeX

Interests: Running, skiing, hiking, rowing; film, music, reading, travel

Anwitha Duduka

anwithaduduka@gmail.com | +1 (737) 280-2229 | [Linkedin Profile](#)

EDUCATION

Amherst College

Bachelor of Arts in Economics & English

Amherst, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.88/4.0
- **Relevant Courses:** Intro to Economics, Calculus I, Macroeconomics, Calculus 2, Wall Street Prep Accounting Crash Course
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 07/2026)

PROFESSIONAL EXPERIENCE

Office of Community Living

Resident Advisor

Amherst, MA

Present

- Support 30 residents by fostering a safe, inclusive, and connected residential community
- Plan four programs per term and resolve resident conflicts to promote engagement and well being.

Ambrosia LLC

Summer Finance Intern

Remote

Jun 2026 – Aug 2026

- Reconciled bank statements with company financial records, ensuring data accuracy and identifying discrepancies through detailed financial review.
- Prepared and maintained rate cards and financial spreadsheets to support pricing decisions and day-to-day finance operations.
- Used Excel, including functions such as VLOOKUP and INDEX MATCH, to organize, analyze, and manage financial data efficiently.

Amherst College Admissions Office

Summer Intern

Amherst, MA

Jun 2026 – Aug 2026

- Led campus tours for prospective students and families, highlighting Amherst's academics, campus life, and student experience.
- Welcomed visitors, managed front desk responsibilities, and helped coordinate daily campus visits.
- Represented Amherst as a student ambassador by answering questions and providing a welcoming campus visit experience.

Morgan Stanley

MAP Investment Banking Fellow; Team Captain

Remote

Mar 2026 – Jul 2026

Selected Transaction Experience | [Pitch Book](#) | [Client Presentation](#) | [Final Recommendation](#)

- Vanta — *Security Compliance Automation Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/10 captains from 376 NCAA athletes (top 2%) to lead a 5-person deal team through 6 weekly workstreams to evaluate software/AI-driven acquisition targets for a prospective PE client and deliver a live investment recommendation on 6/8
 - Evaluated Vanta's positioning across 3 key trends (cybersecurity, SaaS, AI automation) and 3 risks (competition, enterprise expansion, pricing pressure), developing structured insights + mitigation strategies that improved team's overall decision-making
 - Sized market opportunity using top-down analysis of ~\$6T TAM, ~\$80–100B SAM and ~\$15–25B SOM, benchmarking 4+ peers to assess growth drivers, competitive intensity and pricing dynamics, strengthening strategic clarity/investment conviction.

Daily Moments

Founder

Austin, TX

Jan 2024 – Present

- Designed and distributed 4,000+ psychology-based journals across hospitals, shelters, and schools in 20 states and 4 countries, applying behavioral-science principles to build confidence and coping skills among underserved youth.
- Built partnerships with clinics, nonprofits, and educators while managing budgets, production, and fulfillment logistics, creating a repeatable model that expanded distribution and program sustainability.

Private Tennis Coaching Business

Founder & Head Coach

Austin, TX

Jun 2022 – Jul 2025

- Built and operated a coaching business serving 20+ youth players, developing individualized training plans and tracking progress to improve performance and client retention.
- Managed pricing, scheduling, court allocation, and 15+ recurring lessons, optimizing capacity and profitability.

LEADERSHIP & COMMUNITY DEVELOPMENT

Amherst DEI Team

Representative for Women's Tennis

Amherst, MA

Aug 2025 – Present

- Represent Amherst's tennis team by leading 5+ workshops and facilitating discussions on identity, equity, and belonging, strengthening communication, trust, and team culture among student-athletes.
- Partner with the NCAA and 3+ campus stakeholders to support department-wide programming and inclusion initiatives, increasing engagement and ensuring student-athlete perspectives are represented.

Westwood Highschool Varsity Tennis

Captain & 4-Year Starter

Austin, TX

Jul 2021 – Nov 2024

- Ranked #10 in Texas and top-120 nationally in the Class of 2025, earning Division I–III recruiting interest while leading 30+ teammates through training, match preparation, and daily accountability.
- Produced 15+ technical match analyses evaluating match patterns, strengths, and improvement areas, translating performance data into actionable coaching insights that improved teammates' preparation, confidence, and performance.

NON-TECHNICAL SKILLS & INTERESTS

Skills and Language(s): English (Native/Fluent), Telugu (Proficient), Guitar, Tennis, Pickleball, Cooking, Art, Design

Software Programs: Microsoft Excel, Canva, all Google Applications | **Early ID Programs:** 2026 Goldman Sachs Possibilities Summit

Interests: Spongebob, Elliot Smith, Poetry, Hunger Games, Justin Bieber, House Music

Audrey C. Spaly

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EDUCATION

Columbia University

Bachelor of Arts in Economics

New York, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 3.92/4.0 | **SAT:** 1510 (taken fall of sophomore year of high school)
- **Relevant Coursework:** Principles of Economics, Intermediate Macroeconomics, Calculus III
- **Awards & Honors:** Dean's List (Fall 2025, Spring 2026) Division I Student Athlete (Women's Varsity Lacrosse), USA Lacrosse All-American (2025), Marin Athletic Foundation Outstanding Student Athlete (2025), National Merit Commended Scholar (2024), All-MCAL First Team in Lacrosse (2024, 2025)
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 9/2026)

PROFESSIONAL EXPERIENCE

UBS

Remote

MAP Investment Banking Fellow

Jun 2026 – Sep 2026

- Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Execution Phase for a deal team of 5, building a valuation/transaction analysis for a live recommendation to UBS Directors
- Built a 5-year financial model incorporating market share and revenue growth assumptions, evaluating operating performance + market-share sensitivity to quantify the company's outlook and establish inputs for valuation
- Analyzed 3 precedent transactions, co-designing a 12-page pitch book to benchmark valuation + support the team's final recommendation

BioMarin Pharmaceutical

San Rafael, CA

Summer Accounting Intern

Jun 2026–Aug 2026

- Supported month-end close and reconciliation processes across accruals, prepaids, payroll, and intercompany accounts within US Controllershship, building and documenting Excel-based reporting tools used by the broader accounting team
- Performed SOX-compliance testing and vendor/invoice analysis under quarterly reporting deadlines, partnering with senior accountants across functions to identify and resolve unrecorded liabilities and reporting gaps

Tiburon Peninsula Club

Tiburon, CA

Fitness Desk Associate

Jun 2025 – Aug 2025

- Served 100+ members daily by managing facility check-ins, coordinating front-desk operations, and maintaining organizational standards across the fitness center, ensuring a safe and efficient environment that enhanced member experience/operational reliability

Tahoe Expedition Academy

Truckee, CA

Coach & Counselor

Jun 2024 – Aug 2024

- Coached 30+ youth athletes ages 6–14 across lacrosse and multi-sport programs, delivering skill instruction, team activities, and mentorship that strengthened athletic development, sportsmanship, and participant engagement across diverse competitive settings

LEADERSHIP & COMMUNITY DEVELOPMENT

Columbia University Division I Women's Lacrosse

New York, NY

Student Athlete

Sep 2025 – Present

- Commit 30+ hours weekly to Division I lacrosse practices, competition, film review, and strength training while balancing rigorous academic demands, demonstrating discipline and resilience that enhanced performance under high-pressure team environments
- Collaborate with 35+ coaches and teammates throughout year-round training and competition, executing strategic game plans and adapting to dynamic situations that strengthened communication, accountability, and team-oriented decision-making skills

116th and Partners | Selective Student-Led Finance & Investment Club

New York, NY

Board Member

Sep 2025 – Present

- Develop and present multiple stock pitches with a 4-member investment team each semester, evaluating valuation drivers, industry dynamics, and company fundamentals before delivering recommendations to 50+ peers, strengthening overall investment judgment
- Deliver several market updates synthesizing 10+ weekly macroeconomic, equity, and capital markets developments while actively contributing to 30+ club meetings and pitch discussions, enhancing financial awareness and elevating analytical rigor across members

Harlem Lacrosse Club

New York, NY

Volunteer Coach & Tutor

Sep 2025 – Present

- Mentor a cohort of 10+ middle school girls through monthly academic tutoring and lacrosse instruction, fostering skill development, confidence, and goal-setting habits in a supportive environment that strengthened student engagement and personal growth for all

Branson School Varsity Lacrosse Team

Ross, CA

Starting Player / Captain

Mar 2022 – May 2025

- Led 25+ teammates as a two-time elected lacrosse captain while collaborating with coaches on practice planning, game strategy, and team development initiatives, fostering a culture of accountability and competitiveness that elevated performance and sustained success

NON-TECHNICAL SKILLS & INTERESTS

Skills: Proficient in Microsoft 365 including Excel and AI tools, ChatGPT, Claude, Google Docs, Google Sheets, Google Slides

Languages: Intermediate Spanish ability

Interests: Running (San Francisco Half Marathon U19 Female Champion 2026), piano, soccer, music

Avery J. Park

Mobile: +1 (917) 951-6150 | Baltimore, MD | averypark25@gmail.com | [Linkedin.com/in/avery-park-9a1516319/](https://www.linkedin.com/in/avery-park-9a1516319/)

EDUCATION

Stanford University

Stanford, CA

Bachelor of Arts in International Relations | Bachelor of Science in Economics | Minor in German Studies

Expected Graduation: May 2029

- **Awards/Accomplishments:** Stanford Club of Germany Best First-Year Language Student Award, Stanford Women's Varsity Squash Team, MASC All-Academic Team, First American Junior Ranked #1 Overall European Squash Federation, Former U.S. Junior ranked #1 Squash Player and U.S. Junior National Team Member
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 07/2026)

PROFESSIONAL EXPERIENCE

Stanford Athletes in Finance

Stanford, CA

Analyst

Sep 2025 – Present

- Selected into a competitive finance program focused on valuation, accounting and financial modeling, completing 10+ weekly technical sessions that strengthened analytical rigor, transaction knowledge + preparation of the investment banking recruiting process
- Completed case-based training in cash flow modeling, comparable company analysis and financial statement review while participating in 5+ mock interviews & alumni networking sessions that improved technical fluency, communication skills and confidence in finance
- Engaged with alumni across investment banking, private equity and venture capital through recurring events, building industry perspective, expanding professional relationships and applying career insights to stronger recruiting preparation & long-term strategies

Morgan Stanley

Remote

MAP Investment Banking Fellow; Team Captain

Mar 2026 – Jul 2026

- Marvell Technology — *AI Infrastructure Semiconductor Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/10 captains from 376 NCAA athletes (top 2%) to lead a 5-person deal team through 6 weekly workstreams to evaluate software/AI-driven acquisition targets for a prospective PE client and deliver a live investment recommendation on 6/8
 - Quantified Marvell's market opportunity using ~\$975B semiconductor TAM, ~\$477B data-center SAM and ~\$100B+ AI ASIC SOM, synthesizing 4+ sources to assess hyperscaler demand/custom silicon trends/infrastructure bottlenecks to frame thesis
 - Analyzed Marvell's positioning against 4+ peers including Broadcom, Nvidia and AMD, evaluating differentiation in design-win pipeline, customer concentration/growth drivers while identifying geopolitical/supply chain risks to improve thesis defensibility

Sidecut Ventures

Remote

Venture Capital Intern

Jun 2024 – Aug 2024

- Sourced 50+ early-stage startups across fintech, healthtech and edtech through market research, database screening and founder outreach, expanding the investment pipeline and increasing visibility into high-potential venture opportunities across multiple sectors
- Evaluated investment opportunities by analyzing business models, market size and competitive positioning across 20+ companies, helping prioritize stronger opportunities and improving screening quality for internal discussions and diligence workflows/processes
- Built a focused pipeline of women's health and operational-efficiency companies by organizing 15+ qualified prospects, creating a clearer sourcing funnel that improved thematic coverage, founder outreach and long-term investment tracking for future opportunities

LEADERSHIP & COMMUNITY DEVELOPMENT

Stanford Women's Varsity Squash

Stanford, CA

NCAA Student-Athlete

Aug 2025 – Present

- Contributed as a freshman to Stanford's undefeated 10-0 season and MASC Team Championship run, competing on courts 8-10 and delivering reliable depth performance that strengthened lineup flexibility, match consistency and overall team success at high-level
- Earned MASC All-Academic Team honors while going 3-0 at the MASC Championships, balancing rigorous academics with elite competition & building on prior success as the first American ranked No. 1 overall in the European Squash Federation girls standings

Make-A-Play Foundation

Remote

Professional Development Fellow

Mar 2026 – May 2026

- Selected as 1 of 50 athletes nationwide from 500+ applicants (10% acceptance) for a Morgan Stanley-sponsored investment banking fellowship, completing a 3-week program with 20+ hours of targeted behavioral interview preparation for a career in high-finance
- Competed against 376 fellows through 3 mock interviews, delivering structured responses across leadership, teamwork and conflict scenarios while improving executive presence, composure and communication in fast-paced/high pressure interview environments

Beyond the Diploma

Baltimore, MD

Podcast Co-Founder and Co-Host

Jun 2025 – Aug 2025

- Co-founded, produced and hosted a career-focused podcast featuring 10+ professionals across finance, sports, media and entrepreneurship, creating engaging conversations that expanded career awareness and professional exposure for student listeners
- Grew audience reach across Spotify and YouTube through consistent content production, guest sourcing and promotion strategies, increasing platform visibility, listener engagement and recurring viewership while building a recognizable brand across digital channels

NON-TECHNICAL SKILLS & INTERESTS

Languages: German (Full professional proficiency), French (Professional working proficiency)

BEATRICE A.E. VARLEY

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EDUCATION

Stanford University - Palo Alto, CA

GPA: 3.71/4.0

B.A. in Economics | Minor in Management Science & Engineering & Sustainability | Anticipated Graduation: June 2028

- Accomplishments: NFHCA Coaches Division I National Academic Squad (2024, 2025); All-ACC Division I Academic Team (2024, 2025)
- Relevant Courses: Principles of Economics; Introduction to Financial Decision Making; Philosophy of Artificial Intelligence

Wellington College - Berkshire, England

International Baccalaureate: 42/45 – Top 3% of results globally | Sept 2019 - June 2024

- Accomplishments: Sports Scholar, Deputy Head of College, Academic Award for GCSE results, Honour Roll
- Activities: Field Hockey Captain, Founder of the Film Production Society, Economics Society

PROFESSIONAL EXPERIENCE

Unity Advisory – *Consulting Intern* | London, England

June 2026 – July 2026

- Worked on the deals team, preparing client-ready information and materials to support live transactions and engagements
- Joined live client calls, gaining direct exposure to how AI consulting engagements are scoped, pitched, and delivered for clients
- Built client-facing slide decks used in live pitches to prospective and existing companies, translating research and analysis into clear narratives
- Conducted research across market capitalisation, SPACs, GAAP measures, and P&Ls to support client analysis and deliverables

J.P. Morgan Chase & Co. (Via Forage) – *Investment Banking Virtual Experience Programme* | Virtual

March 2026

- Worked through J.P. Morgan's self-paced investment banking case study built around a strategic M&A transaction,
- Completing a full DCF valuation and trading comparable analysis on the target company
- Drafted a client synthesis memo setting out the strategic rationale and valuation recommendation for the proposed transaction

UBS X MAP Money Ball Fellowship – *Fellow* | Virtual

June 2026 - Present

- Selected as 1 of 100 NCAA athletes nationwide for MAP's Money Ball Fellowship sponsored by UBS, focused on investment banking recruiting
- Compete in weekly mock interviews simulating investment banking recruiting intensity, receiving structured evaluator feedback from MAP professionals, alumni, finance practitioners across front-office roles, culminating in a final presentation given live to UBS professionals
- Network with UBS investment banking professionals to gain exposure to M&A execution, private equity dynamics, and valuation frameworks
- Construct a simplified LBO model and develop a value creation strategy focused on US expansion, and operational optimisation

LEADERSHIP & COMMUNITY DEVELOPMENT

NCAA Division 1 Varsity Women's Field Hockey, Stanford University – *Varsity Squad Member*

August 2024 – Present

- Sustain 30+ hours of weekly training and competition with a 20+ player roster across the ACC season and earning Academic Squad selections
- Time management: balance full-time Division I athletic program and travel schedule alongside a Stanford economics workload
- Performance under pressure: execute consistently in high-stakes ACC competition, developing habits transferable to professional environments
- Receive, process, and apply feedback from coaching staff in real time under competitive condition

Stanford Athletes in Finance – *Director of Marketing*

June 2026 - Present

- Lead promotional strategy and social media presence for student-athletes in finance, managing LinkedIn content and event marketing across
- Design and produce promotional materials including posters and digital assets to drive engagement and visibility for events and speaker series

Student Athletes in Sustainability – *Co-Leader*

June 2026 - Present

- Co-lead a student-athlete sustainability initiative, overseeing project delivery, member co-ordination and group finances
- Serve as primary liaison to Stanford Athletic Department administration, managing communications and institutional relationships

Community of International Student Athletes – *Co-Leader*

June 2026 – Present

- Lead a student-athlete organisation supporting international athletes as they navigate challenges related to adjusting to life in the United States
- Advocate for international student-athletes by identifying common challenges and communicating recommendations to Stanford Athletics

Wellington College Ambassador Program – *University Ambassador*

August 2025 – Present

- Mentor current Wellington pupils through the US university application process, drawing on first-hand experience of Stanford admissions
- Advise on the differences between UK and US higher education including Common App, standardised testing, essay strategy and student life

Stanford Field Hockey Sixes Tournament – *Co-Organiser and Umpire*

April 2025 & April 2026

- Built and maintained master Excel tracker for 16+ teams, covering fixtures, scores and officiating assignments across both tournament editions
- Co-ran tournament logistics across team coordination, scheduling and event-day operations; officiated as umpire across tournament matches

PAE Freshman Athlete Mentor, Stanford University – *Mentor*

September 2025 – December 2025

- Mentored incoming Division I first-year student-athletes through their first academic quarter at Stanford, providing one-on-one guidance on balancing NCAA training with academic life

NON-TECHNICAL SKILLS & INTERESTS

- Skills and Language(s): French (semi-professional); Latin (intermediate)
- Programs: Python; Java; JavaScript; Microsoft Excel, Claude
- Interests: Reading, Tennis, Painting, Film and Film Production, Football (Liverpool FC)

BENJAMIN ARONSON

500 College Ave | Swarthmore, PA 19081 | (617) 916-4909 | baronso1@swarthmore.edu

EDUCATION

Swarthmore College | Swarthmore, PA

Expected May 2029

Candidate for BA in Economics and Philosophy; GPA: 4.00/4.00

- Relevant Coursework: Accounting, Linear Algebra, Logic, Computer Science, Economics, Calculus, Statistics

EXPERIENCE

Polaris Growth Fund | Boston, MA

June 2026 – July 2026

Private Equity Intern

- Sourced, screened, and mapped 150+ maritime software companies, identifying 120+ viable investment targets based on scale, ownership, funding history, business model, and strategic fit
- Applied the firm's proprietary tiering framework to prioritize 30 high-potential acquisition targets, focusing the investment team's sourcing and outreach efforts on the most attractive companies and subsectors
- Developed a comprehensive maritime software investment thesis covering industry dynamics, key trends, headwinds and tailwinds, horizontal M&A opportunities, and nine priority targets

The Run House | Needham, MA

Apr 2025 – Aug 2025

Sales Associate

- Generated \$75K in summer sales by assisting customers and providing tailored product recommendations
- Managed inventory for 100+ SKUs, placing 10+ restock orders monthly to ensure availability of products
- Collaborated with team members to maintain organized store environment, enhancing customer experiences

EXTRACURRICULAR / LEADERSHIP

Swarthmore Cross Country and Track and Field | Swarthmore, PA

Aug 2025 – Present

Varsity Team Member

- Manage 25+ hours per week of practices, weight training, travel, and meets with a full academic course load
- Collaborate with teammates and coaches to set performance goals, track progress, and foster a culture of accountability and improvement

Clarus Capital | Swarthmore, PA

Oct 2025 – Present

Investment Analyst

- One of four freshmen selected from 30 applicants (13% acceptance rate) for long-only fund with \$40K AUM
- Present stock pitches, supporting investment decisions through financial and qualitative analysis
- Research and deliver market updates and portfolio reviews to assess existing fund positions

MAP x Morgan Stanley Skills Challenge

Mar 2026 – July 2026

Heidi Health — Strategic Advisory Simulation

- Selected as 1 of 75 NCAA student-athletes nationwide (~20% acceptance rate) for an investment banking fellowship and strategic advisory case developed in partnership with Morgan Stanley
- Built 5+ exhibits analyzing revenue growth, margin expansion, cost structure, liquidity, and operating KPIs for an AI-enabled clinical documentation platform
- Evaluated the company's scalability and path to profitability and presented findings and strategic recommendations to a panel of finance professionals

TOPS Soccer and Basketball | Wellesley, MA

Sep 2023 – Jun 2025

President

- Led operations for a community sports program supporting students with intellectual disabilities
- Recruited and managed a team of 30+ volunteers to deliver weekly practices and events
- Recognized with Darrien Tan Scholarship for exceptional leadership, community service, and mentorship

ADDITIONAL INFORMATION

Community: Community Service Club, Kids Backing Kids, Cradles to Crayons

Interests: Hiking, Rock Climbing, Pickleball, Golfing, Chess, Skiing, and Weightlifting

Benjamin H. Ohrr

925.364.0790 | bho6@fordham.edu | LinkedIn.com/in/benjaminohrr

EDUCATION

Fordham University, Gabelli School of Business

Bachelor of Science in Finance

Bronx, New York

Expected: May 2029

Cumulative GPA: 3.97/4.0

Awards/Accomplishments: Woolworth Scholar Award (3.80+ GPA), Atlantic 10 Commissioner's Honor Roll, EY Ground Floor Challenge Semifinalist

Relevant Coursework: Business Statistics, Business Calculus, Microeconomics, The Ground Floor

Organizations: Pre-Finance Scholars, NCAA Division I Men's Swimming, Alternative Investment Club, Ascend

FINANCIAL EXPERIENCE

UNCLE Credit Union

Livermore, California

Lending Summer Intern

May 2026 – Present

- Supported loan origination and credit documentation processes for \$22M+ in newly originated loans, ensuring regulatory compliance and accuracy within a high-volume lending environment.
- Evaluated youth banking technology solutions by engaging with 10+ vendors, analyzing pricing and capabilities, and presenting 5 vendor demonstrations and recommendations to senior leadership.
- Audited and migrated \$300M+ in historical loan records into internal systems, improving financial data accuracy and accessibility for lending teams.

MAP x Morgan Stanley

Virtual, United States

Spring Investment Banking Fellow

March 2026 – May 2026

- Selected as 1 of ~75 NCAA athletes (~15% of applicants) through MAP to lead Execution Phase for a 5-person deal team in a Morgan Stanley-sponsored case, driving valuation modeling, precedent transaction analysis, and risk assessment across multiple workstreams.
- Completed weekly 10+ hours of behavioral and technical interview prep simulating Superday intensity, then led valuation of Mercury through benchmarking against Brex, Ramp, Rho, Stripe, Plaid, and Navan to support an investment recommendation.
- Built valuation and risk framework using 5+ institutional and industry sources, assessing monetization risk, regulatory exposure, and competitive pressure to present a defensible final recommendation to Morgan Stanley, placing 3rd of 15 teams.

Citi Freshman Discovery Program

Virtual, United States

Participant

May 2026

- Selected for Citi's finance-focused early career program centered on investment banking, capital markets, and broader financial services career pathways.
- Participated in technical workshops, networking sessions, and mentorship discussions with Citi bankers and senior professionals covering financial analysis, market trends, and career development in banking.

EXTRACURRICULARS AND ACTIVITIES

Fordham University Men's Swimming (NCAA Division I)

Bronx, New York

Varsity Athlete

August 2025 – Present

- Compete at the NCAA Division I level while balancing 20+ hours of weekly training with a 3.97 GPA, demonstrating elite discipline, time management, and the ability to sustain high performance across academic and athletic commitments.
- Collaborate with coaches and teammates to analyze race splits and performance data, implementing technical stroke adjustments and training refinements that contribute to team scoring, measurable performance gains, and continuous competitive improvement.

Ethereal Apparel L.L.C.

Dublin, California

Founder and CFO

May 2021 – September 2025

- Founded and scaled a custom apparel brand to \$70K+ in annual revenue, achieving 35–40% gross margins through strategic pricing, disciplined cost management, and overseas supplier negotiations.
- Directed end-to-end operations, including product design, overseas manufacturing coordination, supplier negotiations, and fulfillment logistics, optimizing production timelines, maintaining quality control standards, and improving gross margins as cumulative order volume surpassed 10,000 units.
- Built and managed a fully integrated e-commerce platform, implementing customer acquisition strategies that increased conversion rates and drove consistent revenue growth across multiple product launches.

SKILLS AND INTERESTS

Skills: Time Management, Leadership, Financial Planning, Financial Analysis, Data Analysis, Financial Modeling

Languages: Conversational Korean, Basic Spanish

Interests: Swimming, St. Louis Cardinals Baseball, Watch Collecting, Hiking, Landscape/Street Photography

Programs: Microsoft Excel, Python, Microsoft Access, PowerPoint, Word

Benjamin Imani

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EDUCATION

Middlebury College

Bachelor of Arts in Economics

Middlebury, VT

Expected Graduation: May 2029

- **Cumulative GPA:** 3.8/4.0
- **Honors/Awards:** NCAA DIII Student-Athlete, AP Scholar with Distinction, National African American Recognition Program
- **Relevant Courses:** Economics Statistics, Intro to Computer Science, AP Statistics, AP Microeconomics, AP Macroeconomics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow & Team Captain

Remote

Jun 2026 – Present

Selected Transaction Experience

- SAP — *Enterprise Cloud & Business AI Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/12 captains from 594 NCAA athletes (top 2.0%) to direct a 5-person advisory team across 6 weekly workstreams, recommending SAP as a European enterprise software acquisition target for an unnamed U.S. PE client live to UBS on Aug. 17
 - Mapped SAP's \$163.4B European AI market, \$36.4B enterprise AI SAM and 3 priority software verticals using 5+ industry sources, connecting agentic AI adoption, infrastructure spending + tighter corporate budgets to team's downstream market view
 - Benchmarked SAP's €36.8B revenue base, €77B cloud backlog and 3-peer set against Oracle, Salesforce and Workday in a 12-page pitch book, applying 20+ hours of Wall Street Prep accounting work to test growth assumptions and support our thesis

Gleason Family YMCA

Head Summer Camp Counselor

Wareham, MA

Jun 2025 – Aug 2025

- Led daily programming for 30+ campers by supervising recreational activities, coordinating schedules and maintaining a safe environment, fostering teamwork and accountability while delivering an engaging experience for participants throughout the summer
- Managed a team of 5+ junior counselors by delegating responsibilities, providing guidance and coordinating daily operations, improving communication/s across the entire staff while ensuring consistent leadership across multiple camp activities and age groups
- Communicated with 30+ families by addressing questions, resolving concerns and providing daily updates on camper progress, building trust with parents while contributing to smooth operations and a positive overall experience throughout the full camp season

Northeastern University

Research Intern

Boston, MA

May 2023 – Sep 2024

- Conducted historical research under faculty mentorship by analyzing 100+ archival records, cemetery data and primary sources, reconstructing overlooked personal histories while contributing meaningful findings to an ongoing university research effort/initiative
- Compiled evidence from historical documents, public archives and cemetery records across 20+ research sessions, synthesizing qualitative information into organized findings that advanced project objectives while sharpening analytical-based & investigative skills

Bishop Feehan High School

Basketball Camp Counselor

Attleboro, MA

Jul 2022 – Aug 2024

- Coached youth athletes across 3+ summer camp sessions by organizing skill development drills, competitive games and team activities, encouraging sportsmanship & confidence while creating an engaging environment for all participants of varying skill/experience levels
- Designed interactive activities for 20+ campers by adapting instruction to different ages and skill levels, promoting teamwork and competitive growth while ensuring all campers remained engaged through structure learning opportunities & game-based competition

LEADERSHIP & COMMUNITY DEVELOPMENT

Middlebury Men's Basketball

NCAA Division III Student-Athlete

Middlebury, VT

Oct 2025 – Present

- Earned a varsity roster spot as a freshman after joining as a non-recruited walk-on, demonstrating persistence through 100+ hours of training, individual skill development and team practices to contribute meaningfully to one of Division III's top basketball conferences
- Commit 20+ hours weekly to practices, strength training, competition and film study while balancing a rigorous academic schedule, developing time management skills, resilience, discipline + consistent execution in a highly competitive collegiate/athletic environment

Green Team at Bowen's Wharf

Volunteer

Newport, RI

Jul 2022 – Present

- Volunteered in recurring shoreline cleanups by collecting, sorting and disposing of waste across Bowen's Wharf, contributing 50+ service hours while helping preserve Newport's waterfront environment through consistent community stewardship and engagement
- Collaborated with fellow volunteers during 20+ environmental service events by removing litter and maintaining public spaces, promoting sustainability while supporting the long-term conservation efforts along one of Rhode Island's busiest coastal destinations

NON-TECHNICAL SKILLS & INTERESTS

Skills: Python, Microsoft Office (Excel, Word, Powerpoint, OneNote), Google Workspace (Docs, Sheets, Forms, Slides)

Languages: English (fluent), Swahili (fluent), Spanish (intermediate) | **Interests:** History, Literature, Sports

BRENDEN McMAHON

zwh3ga@uva.edu | (908) 581-7214

EDUCATION

The University of Virginia – Charlottesville, VA
McIntire School of Commerce
UVA McIntire AI Essentials Certificate, Fall 2025

GPA: 4.00 / 4.00
Anticipated Graduation: May 2029

Ridge High School – Basking Ridge, NJ
1570 SAT score: 800 math, 770 reading – test taken once

GPA: 4.64 / 4.00
Graduation: June 2025

Relevant Coursework

- Foundations of Commerce, Introduction to Data Science with Python
- AP Microeconomics, AP Macroeconomics, AP Statistics, AP Calculus AP, AP Calculus BC

ATHLETIC EXPERIENCE

UVA Cross Country/Track and Field – Charlottesville, VA

August 2025 - Present

- Competing and training at the Division I level in distance events
- Managing 20+ hours/week of practice and team events while maintaining a challenging academic schedule

UVA Athletics in Leadership Academy – Charlottesville, VA

Spring 2026

- Partnered with the UVA Cavalier Futures Foundation to award \$200,000 in grants
- Collaborated with student athletes to select grant recipients from a pool of 50 community applicants

UVA Athletics in Leadership Academy – Charlottesville, VA

Fall 2025

- Selected as the only representative from the UVA Men's Cross Country/Track and Field teams
- Developed personal leadership skills through meetings and assignments facilitated by the Frank Batten School of Public Policy and Leadership

Run Charlottesville – Charlottesville, VA

Spring 2026

- Volunteered with UVA athletes and peers to coach community youth
- Assisted in activities, organization, setup/cleanup

Team Captain - Ridge Cross Country, Winter Track and Spring Track – Basking Ridge, NJ

July 2023 – June 2025

- Mentored teammates across event groups, organized practices and team dinners
- Led the team to several championships throughout junior and senior years

PROFESSIONAL EXPERIENCE

Deloitte University Compass Conference – Dallas, TX

August 2026

- Connected with 400+ students and professionals across various tax and audit workshops
- Analyzed client information to make informed decisions through simulated practices

MAP x UBS – Investment Banking Summer Fellow – Remote

June 2026-Present

- Selected as 1 of 100 NCAA athletes nationwide for MAP's Money Ball fellowship sponsored by UBS, focused on investment banking recruiting, technical preparation, and cross-border private equity strategy
- Prepared financial metrics of a private company and presented findings in a presentation to UBS

Expedition EY – Virtual

Spring 2026

- Participated in Business Track learning modules
- Developed business skills while discovering career opportunities

Ridge Runners Media – Basking Ridge, NJ

September 2023 – June 2025

- Wrote weekly articles for the Ridge Cross Country/Track and Field teams showcasing achievements
- Published articles in local newspapers and online forums

ACTIVITIES

- UVA Accounting Society at McIntire
- Ridge High School Orchestra
- Ridge High School Student Government
- Tutor, National Honor Society & National Latin Honor Society

Fall 2025 - Present
Co-principal, 2021 – 2025
2023, 2025
September 2023 – June 2025

Brianna A. Cong

bcong@wharton.upenn.edu | Johnston, Iowa | (302) 213-9907 | www.linkedin.com/in/brianna-cong

EDUCATION

The Wharton School — University of Pennsylvania

Bachelor of Science in Economics

GPA: Worried about MAP sending reusing this without permission

Philadelphia, PA

May 2029

Phillips Exeter Academy

GPA: Not putting on for MAP | **SAT:** I have a normal non censored resume elsewhere

Exeter, NH

June 2025

- Advanced Coursework: Multivariable Calculus, Abstract Proofs, AP Calculus BC, AP Chemistry, AP Physics

WORK EXPERIENCE

ManchesterStory Fund Management, LP

Venture Capital Intern

West Des Moines, IA

May – August 2026

- Supported the full deal lifecycle by sourcing startups, conducting founder outreach, participating in 63 founder calls and 25 Investment Committees, and producing deal flow reports and newsletter content for Strategic Partners
- Conducted due diligence on 25+ early-stage startups by researching markets and competitors, building valuation analyses, modeling cap tables, managing the CRM, and preparing for founder diligence meetings
- Developed an original investment thesis on open-weight AI models, analyzing their potential impact on startups and portfolio companies and presenting findings in a one-hour firmwide session

MAP Investment Banking Fellow

Sponsored by UBS

Remote

June – Sep 2026

- Selected as 1 of 12 NCAA athletes from 594 applicants to lead Eye Security's valuation and transaction, benchmarking 3 comparable companies, assessing key transaction risks, and presenting findings to UBS directors

U.S. Naval Reserve Officer Training (NROTC)

Naval Officer-in-Training

Great Lakes, Chicago

July – August 2025

- Completed intensive naval leadership and operational readiness training, achieving competency at skills including small arms, firefighting, damage control, gas-chamber resiliency, steamship operation, and rescue swimming

Normal Next

Digital Marketing Intern

Jacksonville, FL

July – August 2024

- Translated field and literature research on intergenerational community networks into 6 digital marketing graphics, 3 investor communications, and 5 presentations used to engage external investors and board members

LEADERSHIP & COMMUNITY DEVELOPMENT

UPenn Swimming & Diving | [News](#)

August 2025 – Present

- Compete in 3 individual events and 2 relays at the NCAA DI level, contributing to 2 UPenn program records
- Qualified for the Ivy League Championships and earned CSCAA Scholar All-America for academics/athletics

Wharton Undergraduate Hedge Fund Club | Long/Short Committee Member, Philadelphia, PA

August 2025 – Present

- Researched and applied long/short equity strategies, performing quantitative analysis and modeling to evaluate risk/reward scenarios, and produced reports demonstrating findings for club portfolio projects

Wharton Undergraduate Management Club | Finance Committee Member, Philadelphia, PA

August 2025 – Present

- Gained hands-on experience in finance concepts, including budgeting, forecasting, investment strategies, and portfolio analysis, applying them directly to support committee initiatives

Swim Team Captain | Exeter, NH

February 2024 – February 2025

- Led a 45-member team to achieve a third consecutive New England Prep School Athletic Committee championship

NON-TECHNICAL SKILLS & INTERESTS

2022 - 2026 13× All-American Swimmer; 3× Scholastic All-American

Bridget J. Chantharath

Mobile: +1 (626) 764-1775 | bchantharath1@gmail.com | Hacienda Heights, CA | [LinkedIn Profile](#)

Education

Columbia University

Bachelor of Arts in Economics - Statistics

New York, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 3.76/4.0 | **SAT:** 1400
- **Honors/Awards:** Northwood High School Summa Cum Laude, 2025 District Scholar-Athlete Award, 2025-26 WCGA Academic All-American
- **Relevant Courses:** Calculus-Based Intro to Statistics, Computer Science- Java
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 07/2026)

PROFESSIONAL EXPERIENCE

Ivy Athlete Recruiting

Advisor

Remote

Dec 2025 – Present

- Mentor 10+ younger athletes pursuing Division I Ivy League recruiting opportunities, sharing firsthand experience and strategic guidance while strengthening leadership, communication and relationship-building skills through individualized advising & mentorship
- Support prospective student-athletes through recruiting preparation and outreach strategy discussions, helping athletes understand Ivy League expectations, athletic positioning and long-term recruiting timelines through consistent mentorship and personalized guidance

Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Jul 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Marvell Technology — *AI Infrastructure Semiconductor Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/75 NCAA athletes (~20%) to lead the full Control Phase for a 5-person deal team, validating Marvell's AI infrastructure thesis, stress-testing model assumptions & refining team's final recommendation to MS bankers live on 6/8/2026
 - Analyzed 3 growth drivers behind Marvell's AI upside, including the projected \$260B CapEx surge, \$670B+ cloud infrastructure spend and FY2027 revenue ramp to \$10.86B, strengthening conviction around hyperscaler demand and custom ASIC adoption
 - Evaluated supply-chain and competitive risks across Marvell's AI chip strategy, assessing 54% Taiwan/China exposure, Broadcom peer dynamics and 13.2x forward revenue valuation to support a 20% margin-of-safety investment case for the team

Door-to-Door Shipping Center

Data Entry Assistant & Customer Service

Rowland Heights, CA

Jun 2024 – Aug 2025

- Performed data entry and supported basic accounting functions, including transaction recording, payment processing, and invoice tracking to maintain accurate financial records
- Assisted 25+ clients weekly with shipping and logistics transactions, ensuring accuracy and efficiency while handling bilingual (Mandarin/English) customer interactions

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

Columbia Women's Golf

NCAA Varsity Student-Athlete

New York, NY

Aug 2025 – Present

- Contributed to Columbia's 2026 Ivy League Championship team (first since 2007) while helping secure the program's first team tournament victory in 10+ years, improving program rankings by 200%, strengthening competitive performance, accountability and teamwork within one of the most successful seasons in program history
- Balance rigorous academic coursework alongside 20+ hours/week of Division I golf training, travel and competition, strengthening discipline, independence and time-management skills within a nationally competitive collegiate student-athlete environment

Upper Deck Golf

Site Visit Director & Mentor

New York, NY

Sep 2025 – Nov 2025

- Assisted with front-entry check-in operations at Yankee Stadium, supporting participant engagement and event logistics while collaborating with major athletic brands to promote golf accessibility through an interactive sports entertainment experience
- Engaged with 100+ participants throughout Upper Deck Golf events, strengthening communication and customer-service skills while helping create an accessible, community-focused environment encouraging youth interest and participation in golf and athletics

Northwood High School

Challenge Success Athletics Leadership Member & Women's Golf Varsity Captain

Irvine, CA

Aug 2024 – Jun 2025

- Selected among the top 10% of student-athletes to collaborate with coaches, parents and faculty on schoolwide athletic initiatives, contributing recommendations tied to student-athlete balance, funding priorities and long-term program development efforts
- Qualified for the California State Championships as a freshman while helping establish 3 school golf records, demonstrating leadership, perseverance and teamwork skills that strengthened program culture and competitive performance across the varsity team

SKILLS & INTERESTS

- **Skills and Language(s):** Chinese Mandarin (Speaking/Listening), Problem Solving, Creativity, Public Speaking
- **Interests:** Reading, Gym, Drawing

Calla S. Yim

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EDUCATION

Cornell University

Bachelor of Arts in Economics | Minor in Business

Ithaca, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 3.73/4.0 | **SAT:** 1510
- **Honors/Awards:** NCAA Division I Student-Athlete (Varsity Women's Squash)
- **Organizations:** Cornell Korean American Society Association (KASA), Cornell Alpha Xi Delta Sorority, SEO Edge
- **Relevant Courses:** Introductory Microeconomics, Introductory Macroeconomics, Introductory Statistics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow & Team Captain

Remote

Jun 2026 – Present

Selected Transaction Experience

- Helsing — *AI-Powered Defense Technology Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/12 captains from 594 NCAA athletes (top 2.0%) to lead a 5-person deal team through 6 weekly workstreams, presenting Helsing as a European defense AI acquisition target for a hypothetical U.S. PE client live to UBS bankers on Aug. 17
 - Analyzed Helsing's ~\$38.8B global military AI TAM, ~\$9B–\$12B NATO defense SAM and ~\$4.09B European market opportunity using 5+ sources, evaluating procurement trends, autonomous systems demand & policy risks to shape team's thesis
 - Synthesized Helsing's ~\$18B valuation, ~\$2.78B raised, 900+ employees and 3-peer comp set into a 12-page pitch book, applying 20+ hours of Wall Street Prep accounting work to evaluate execution risks, benchmark competitors and support thesis

VSI Valuation Services

Summer Valuation Analyst

Arlington, VA

May 2026 – Aug 2026

- Supported valuation engagements by analyzing financial statements, conducting market and industry research and preparing valuation workpapers, gaining exposure to 100+ client engagements while building technical experience in business appraisal + advisory projects
- Assisted professionals in developing valuation reports for attorneys, CPAs & financial advisors by applying financial analysis, company research and valuation methodologies, strengthening analytical judgment while contributing to high-quality client deliverables/projects

Bouncing Back

Director of Operations

New England Area

Jan 2022 – Sep 2024

- Directed operations for a digital platform supporting Asian student-athletes by recruiting creators, managing content strategy and overseeing 3+ communication channels, expanding audience engagement and increasing visibility across the entire regional community
- Coordinated the 2023 Bouncing Back Conference by organizing workshops, collaborating with student leaders and managing event logistics, creating meaningful networking opportunities for students at New England boarding schools to meet and connect once/year

LEADERSHIP & COMMUNITY DEVELOPMENT

SEO Career

SEO EDGE Participant

New York, NY

June 2026 – Present

- Built a strong foundation in core business concepts, directly strengthening competitiveness in top-tier internship recruiting
- Strengthen interview, technical, and professional skills through targeted coaching and structured online learning
- Complete industry-specific training focused on developing technical skills, institutional knowledge, and attention to detail

Cornell University | Varsity Women's Squash

NCAA Division I Student-Athlete

Ithaca, NY

Sep 2025 – Present

- Commit 20+ hours weekly to Division I squash through practices, strength training, match preparation and travel while balancing a rigorous academic workload, developing discipline + time management at one of the nation's most competitive collegiate conferences
- Compiled a 3–2 freshman record competing at the No. 7–9 ladder positions, opening the season with 3 consecutive straight-game victories while demonstrating adaptability, composure + the ability to perform well under pressure against nationally ranked opponents

St Paul's School in New Hampshire | Sports & Business Organizations

Team Captain & Food Committee Head

Concord, NH

Nov 2024 – Feb 2025

- Led a nationally ranked Top 10 squash program as team captain by organizing practices, mentoring teammates and fostering team culture while earning 3× NEPSAC All-League and 4× Beekman Rackets Award recognition for athletic performance and leadership
- Partnered with students and administrators to reduce campus food waste by 50% while improving dining quality and nutrition as Food Committee Head, coordinating ~5 sustainability initiatives that enhanced the student experience through measurable improvements

Team USA Squash

Team Member

Philadelphia, PA

Jun 2024 – Aug 2024

- Represented the U.S. Junior National Squash Team at the 2024 Egyptian Junior Open, competing against elite international talent while earning US Squash Scholar Athlete honors through disciplined preparation, academic excellence & consistent high-level performance

NON-TECHNICAL SKILLS & INTERESTS

Skills: Leadership, Squash Coaching, Management, Instruction, Social Media, Canva, Design, Art, Website Design

Languages: Chinese (low-moderate proficiency), Korean (moderate proficiency), Javascript, Python, C++ (low-moderate proficiency)

Interests: Pickleball, fitness, Squash, movies, TV shows, house music, restaurant exploration, traveling, building legos

Camille I. Ching

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EDUCATION

Harvard University

Bachelor of Arts in Statistics (Machine Learning Track) | Secondary in Economics

Cambridge, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0 | **SAT:** 1550
- **Honors/Awards:** Carlmont High School Valedictorian, National Merit Scholarship Finalist
- **Relevant Courses:** Probability, Statistical Inference, Vector Calculus and Linear Algebra with Proofs, Macroeconomics, Wall Street Prep Accounting & Financial Statement Analysis

PROFESSIONAL EXPERIENCE

Morgan Stanley

MAP Investment Banking Fellow; Team Captain

Remote

Mar 2026 – Jul 2026

Selected Transaction Experience | [Pitch Book](#) | [Client Presentation](#) | [Final Recommendation](#)

- Databricks — *Enterprise Data & AI Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/10 captains from 376 NCAA athletes (top 2%) to lead a 5-person deal team through 6 weekly workstreams, building the foundation for Databricks by defining its lakehouse architecture, AI capabilities & enterprise use cases for the bank
 - Sized Databricks' opportunity using ~\$1.44T software TAM, ~\$250B data/AI SAM and ~\$30–50B SOM, synthesizing 4+ sources to evaluate growth across data infrastructure/cloud software/agentic AI, thereby grounding the team's investment thesis
 - Assessed Databricks' positioning against ~5 peers including Snowflake, MongoDB and Palantir, analyzing differentiation in unified architecture and multi-cloud strategy while identifying risks around hyperscaler competition & sales scalability for thesis

Fabric Health

Data Entry Contractor

Remote

May 2025 – Oct 2025

- Updated demographics, insurance and benefits information across 100+ member records, helping Pennsylvanians access eligible Medicaid and SNAP benefits through more accurate applications, faster processing timelines and stronger support for families in need
- Recorded medical data for members and their children across daily submissions, producing accurate reports for insurance companies that supported nonprofit reimbursement, funding, and reliable healthcare services for families depending on assistance programs
- Reviewed and corrected 50+ member profiles each week for accuracy and formatting, improving data quality, reducing processing errors and strengthening service delivery for families relying on healthcare access and public benefits support across Pennsylvania

Front Porch Communities & Services

Harvard SPARK Intern

Remote

Jun 2025 – Aug 2025

- Designed an anti-ageism workshop for Front Porch senior living communities, building 1 scalable program with discussion prompts and activities that encouraged positive aging beliefs, stronger resident engagement + healthier long-term outcomes for residents
- Synthesized research and insights from *Breaking the Age Code* into a 15+ slide PowerPoint featuring facts, reflection exercises and action steps that improved awareness of age bias and helped residents and staff build a more positive, inclusive community environment
- Applied the 3P framework (Problem, Person and Pathway) across 5+ case discussions, evaluating context, personal fit and execution options to strengthen structured problem-solving skills and long-term decision-making in mission-driven social impact settings

LEADERSHIP & COMMUNITY DEVELOPMENT

Harvard Women's Swimming and Diving

Varsity Diver, CSCAA Second Team All-American

Cambridge, MA

Aug 2025 – Present

- Dedicate 20+ hours weekly to training, competition, meetings and team responsibilities while managing a full academic course load, sustaining disciplined performance, time management and reliability within a high-achieving D1 athletic environment each semester
- Compete in collegiate meets executing dives under pressure; NCAA Zone qualifier and Ivy League Championships scorer, contributing consistent points and a culture of accountability, resilience, and competitive excellence

Harvard Financial Analysts Club

Quant Member

Cambridge, MA

Sep 2025 – Present

- Completed weekly educational series in quantitative research and trading, valuation models and interview preparation, building analytical fluency and practical finance skills applicable to investment research and competitive recruiting processes
- Learned to read financial statements and build DCF models to assess company quality and valuation, applying those skills to a research-driven short pitch on Pop Mart that strengthened investment judgment and thesis development abilities

Coach for College

Coach

Vi Thuy, Vietnam

June 2026 – July 2026

- Spent three weeks teaching English, dance, and life skills at Ngo Quoc Tri Middle School while living and immersing in rural southern Vietnam, building cross-cultural relationships through daily lessons and activities.

Carlmont Key Club

Secretary (2024-2025), Webmaster (2023-2024)

Belmont, CA

Aug 2021 – Apr 2025

- Maintained and submitted monthly reporting spreadsheets tracking member hours, attendance, projects and meetings, using 100+ data points to recommend improvements and personalized participation plans that increased engagement, accountability, member retention, and progress toward annual club goals, awards, and overall performance.

NON-TECHNICAL SKILLS & INTERESTS

Skills and Language(s): Data Analysis, Problem-solving, English (Native), French (Limited Working Proficiency)

Programs: Python, R, SQL, Microsoft Office, Google Suite

Interests: Systematic Investing, Alternative Data, Signal Discovery, Machine Learning, Language Learning, Travel, Knitting

Camille S. Thai

(650) 885-8182 | Los Altos, CA | camillesthai@gmail.com | www.linkedin.com/in/camille-thai-013490293

EDUCATION

Columbia University

Bachelor of Arts in Financial Economics

New York, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 3.92/4.0
- **Honors/Awards:** WGCA All-American Scholar, Dean's List, Ivy League Champion, NCAA D1 Athlete, California Junior Girls State Champion, IMG World Champion
- **Certifications:** Wall Street Prep Accounting & Financial Statement Analysis

PROFESSIONAL EXPERIENCE

Tensordyne

Finance & Strategy Intern

Sunnyvale, CA

Jul 2026 – Aug 2026

- Condensed a 20+ tab operating model into a five-year Base/Upside summary spanning revenue, EBITDA, working capital, and free cash flow for finance leadership
- Built competitive pricing and benchmarking analysis across 6 AI infrastructure providers, comparing price, throughput, power consumption, and unit economics to assess Tensordyne's market positioning
- Identified an inconsistency in a key competitor performance comparison and rebuilt the analysis on a like-for-like basis, strengthening the pricing case presented to finance leadership
- Conducted market sizing and investment analysis across AI inference hardware, evaluating market opportunity, peer funding, valuations, commercial traction, and competitive differentiation

NimbleRx

Customer Success / Support Reporting & Automation Intern

Redwood City, CA

Jun 2026 – Jul 2026

- Built a live dashboard tracking 35+ in-product tutorials tied to feature-activation revenue, eliminating manual reporting
- Standardized Salesforce churn categories to improve retention reporting and distinguish controllable vs. uncontrollable churn drivers
- Developed an AI-assisted QA workflow using Vertex AI/Gemini to score support conversations against a 15-point customer service rubric

Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Jul 2026

Selected Transaction Experience

- Vanta — *Security Compliance Automation Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1 out of 75 NCAA athletes to lead the Control Phase for a deal team of 5, validating Vanta's compliance-automation investment thesis by organizing diligence findings into a final pitch book and presenting it to Morgan Stanley
 - Evaluated Vanta's ~\$300M ARR, 16,000+ customers, competitive positioning, and AI-enabled compliance capabilities to support the investment thesis around increasing demand for AI-driven compliance automation and continuous monitoring
 - Assessed competitive and scalability risks across the compliance software landscape, evaluating Vanta's product stickiness, AI-enabled automation capabilities, and \$4.15B valuation while developing mitigants around customer integration and adoption

PeakSpan Capital

Immersion Program Participant

Remote

Jan 2026 – Mar 2026

- Evaluated growth strategies and financial metrics for 25+ B2B SaaS companies through growth-equity underwriting and investment screening

Evergreen Professional Investments, LLC

Intern

San Jose, CA

Dec 2025 – May 2026

- Built data models from 15+ architectural blueprints to support real-estate investment evaluation and asset-management decisions

Bay View Golf Club

Pro Shop Assistant and Golf Coach

Milpitas, CA

Aug 2020 – Aug 2025

- Generated ~\$8K in seasonal retail and membership revenue while managing pro-shop operations, inventory, and member service
- Coached 10+ junior golfers across three weekly camps, adapting instruction by skill level to improve fundamentals and player confidence

LEADERSHIP & ACTIVITIES

Columbia University Women's Golf

NCAA Division I Student-Athlete & Starter

New York, NY

Sep 2025 – Present

- Commit 20+ hours/week to NCAA Division I training, competition, and travel while maintaining a 3.92 GPA
- Started in 100% of tournaments as a freshman and helped Columbia capture its first Ivy League Championship in 20 years

Columbia College Women in Business

Active Member

New York, NY

Sep 2025 – Present

- Helped organize Columbia's Annual Women's Leadership Conference, coordinating event logistics and professional programming

SKILLS & INTERESTS

Technical Skills: Claude, Excel, Google Sheets, PowerPoint, Vertex AI/Gemini, Canva, Google Slides

Language: Chinese

Interests: Golf, Graphic Design, Traveling, Fitness, Yoga

Caroline G. Putnam

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EDUCATION

University of Pennsylvania | College of Arts and Sciences

Philadelphia, PA

Bachelor of Arts in Economics | Minor in Data Science and Analytics & Consumer Psychology from the Wharton School

Expected Graduation: May 2029

- **Cumulative GPA:** 3.7/4.0 | **ACT:** 33
- **Relevant Coursework:** Microeconomics; Macroeconomics; Statistics 1020; Calculus I & 2
- **Organizations:** Varsity Softball, Volunteer work at GRACE Food Pantry and Family Promise
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 09/2026)

London School of Economics

London, UK

Summer Program | Corporate Finance

Expected Graduation: Jul 2026

PROFESSIONAL EXPERIENCE

UBS

Remote

MAP Investment Banking Fellow

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Celonis — *AI-Powered Process Intelligence & Optimization Platform (Technology M&A / Capital Markets & Strategic Advisory Simulation)*
 - Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Control Phase for a deal team of 5, developing Celonis's investment thesis & deal rationale for a live presentation to UBS Directors: **Andrew Heller** | **John Delgado** | **Stephen Saville**
 - Built a 3-part investment thesis around enterprise AI adoption, recurring revenue and platform defensibility, evaluating Celonis's system-agnostic technology sleeve + growth levers against \$407B of projected 2026 global enterprise AI spending, up 35% YoY
 - Developed the "why now" case around industry consolidation, competitive shifts and valuation gaps, stress-testing downside market scenarios and synergy realization to establish valuation discipline, deal protections and key checkpoints supporting thesis

Connie Dwyer Breast Cancer Foundation Club

Summit, NJ

Founder & President

Jan 2022 – Jun 2025

- Founded and led a 20+ member club supporting the Connie Dwyer Breast Cancer Foundation, directing fundraising and outreach efforts that expanded awareness of affordable cancer screening and treatment resources for women across underserved communities
- Organized 2 school-wide fundraising initiatives benefiting the Connie Dwyer Breast Cancer Foundation, coordinating promotion, member responsibilities + event execution to increase student participation by 30% while strengthening campus engagement with org.

Blossom Asian Bistro

Summit, NJ

Hostess

Sep 2022 – May 2023

- Delivered high-quality service to 75+ guests/shift in a fast-paced restaurant environment, anticipating customer needs, coordinating closely with 10+ team members and managing guest flow to create a seamless dining experience and maintain strong customer service

LEADERSHIP & COMMUNITY DEVELOPMENT

Student Athlete Investment Club

Philadelphia, PA

Member of Internal Events Committee

Jan 2026 – Present

- Conduct equity research and analyze 5+ macroeconomic trends to develop investment theses and portfolio recommendations, while serving on the Internal Events Committee to organize 3+ networking, educational & financial-literacy events for Penn student-athletes

University of Pennsylvania D1 Softball Team | [News](#)

Philadelphia, PA

NCAA Division I Student-Athlete

Aug 2025 – Present

- Compete on Penn's NCAA Division I softball team while balancing 20+ hours of weekly practices, strength training, competition and travel with a full academic course load, collaborating with 20+ teammates to execute under pressure and achieve shared team success

Penn Athletics Wharton Leadership Academy (PAWLA)

Philadelphia, PA

Participant

Aug 2025 – Present

- Completed 10+ Wharton-designed leadership sessions focused on analytical decision-making, strategic thinking and team problem-solving, applying business frameworks through workshops & real-world scenarios alongside 20+ Penn student-athletes across

Team IMPACT

Philadelphia, PA

Active Member

Aug 2025 – Present

- Participate in 1 structured mentorship program connecting Penn student-athletes with a child facing serious illness, providing consistent team-based support while strengthening leadership, accountability and community engagement through 10+ shared events

Goldman Sachs Possibilities Series

Remote

Participant

Apr 2026 – May 2026

- Selected for Goldman Sachs' competitive Possibilities Series, completing 5+ weeks of firm-led programming focused on investment banking, financial services + professional development while engaging with Goldman Sachs professionals and peers from diverse areas

NON-TECHNICAL SKILLS & INTERESTS

Technical: Proficient in Google Workplace and Microsoft Office, Statistical Analysis, Data Analysis, Financial Research

Languages: Proficient in American Sign Language (ASL) | **Interests:** Health and Wellness, Fitness & Workout Classes, Trying New Restaurants, Watching Comfort TV Shows and Rewatching Favorites, Mindfulness | **Honors and Awards:** First Team All-County, Ranked Top-100 Players in NJ, Union County Interscholastic Athletic Conference Scholar Athlete Affinities

Caroline E. Raynes

Mobile: +1 (713) 553-6599 | Houston, TX | xpi3vh@virginia.edu | [LinkedIn](#)

EDUCATION

University of Virginia

B.A. in Commerce | Leadership Certificate (Batten School of Public Policy)

Charlottesville, VA

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0 | **ACT:** 32
- **Honors/Awards:** D1 Student-Athlete, NFCA National Academic Squad, NFHCA Scholar of Distinction (3.9+ cumulative GPA)
- **Relevant Courses:** Introductory Microeconomics & Macroeconomics, Commerce, Leadership and Public Policy
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 09/2026)

London School of Economics

Summer Program | Corporate Finance

London, UK

Expected Graduation: Jul 2026

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow & Team Captain

Remote

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Klarna — AI-Driven Digital Banking & Global Payments Platform (FinTech M&A / Capital Markets & Strategic Advisory Simulation)
 - Selected as 1/12 captains from 594 NCAA athletes (top 2.0%) to lead a 5-person deal team through 6 weekly workstreams, presenting Klarna as a European AI-driven fintech acquisition target for a hypothetical PE client in the U.S. live to UBS on 8/17
 - Analyzed Klarna's ~\$3.86B European BNPL SAM, estimated ~\$875M Europe SOM and 3 AI-led subsectors using 5+ reputable sources, framing demand drivers/regulatory headwinds/market sizing assumptions to shape team's downstream work
 - Synthesized Klarna's \$3.5B FY2025 revenue, 966K merchant network, 26-country footprint and 3-peer comp grid into a 12-page pitch book, applying 20+ hours of Wall Street Prep accounting coursework to strengthen team's final recommendation

Jefferies Group

Investment Banking Intern

Houston, TX

Jan 2025 – Feb 2025

- Supported 3+ traditional energy deal teams by conducting financial analysis, comparable company research and market diligence across upstream and midstream transactions, providing analytical support for company valuation, and strategic final recommendations
- Built financial and operating models for 5+ energy infrastructure opportunities by evaluating commercial assumptions, transaction economics & industry trends, supporting investment analysis while helping senior bankers assess potential opportunities across group

Private Field Hockey Coach

Independent Instructor

Houston, TX

May 2021 – May 2026

- Built and scaled a referral-based coaching business serving 30+ youth athletes by designing individualized training plans, managing client communication and overseeing daily operations, generating \$10K+ in revenue while strengthening long-term client relationships

NuArc Partners

Search Fund Analyst

Charlottesville, VA

Dec 2025 – Mar 2026

- Sourced and evaluated 100+ acquisition opportunities through industry research, company screening and business analysis across multiple sectors, identifying attractive investment targets while strengthening firm's proprietary acquisition pipeline & sourcing efforts
- Initiated outreach to 75+ founders and brokers through targeted cold-email campaigns and relationship building, expanding proprietary deal flow while qualifying acquisition opportunities + supporting investment discussions with prospective business owners

LEADERSHIP & COMMUNITY DEVELOPMENT

USA Field Hockey U21 Women's National Team | [News](#)

National Team Player

Charlotte, NC

Jan 2026 – Present

- Selected as 1 of 30 collegiate athletes nationwide to represent the United States on the U21 Women's National Team, competing against international competition while strengthening leadership, adaptability and composure under pressure across elite competition

University of Virginia Division I Field Hockey | [News](#)

NCAA Division I Student-Athlete

Charlottesville, VA

Sep 2025 – Present

- Commit 30+ hours weekly to D1 practices, film review, strength training and national competition while balancing a rigorous academic schedule, strengthening discipline, resilience + consistent performance within one of the nation's premier collegiate field hockey teams
- Earned NFHCA Scholar of Distinction and National Preseason Player to Watch recognition through sustained academic achievement and athletic performance, reinforcing consistency, preparation & competitive excellence while contributing to a nationally ranked team

UVA Business, Leadership & Consulting Organizations

First Year Council Class Secretary | Leadership Academy | Trash Talkers Committee

Charlottesville, VA

Sep 2025 – Present

- Elected Class Secretary for UVA's 4,000+ first-year students while evaluating community investment proposals through the Batten Leadership Academy, collaborating with university leadership + supporting funding recommendations across a \$200K+ Virginia grant
- Developed strategic sustainability recommendations through UVA Net Impact Consulting by analyzing D1 athletics operations and presenting actionable solutions to the Office of Sustainability, strengthening collaboration while advancing campus-wide operations

SKILLS & INTERESTS

Technical Skills: Proficient in Microsoft Suite, Financial Modeling Fundamentals, Market Research and Sourcing, Google Workspace, Social Media Strategy | **Interests:** Leadership/Organizational Psychology, American Constitutional Law, Athletics, Performance Analytics

CELINE EBERT

9714 Lakemont Drive, Dallas TX 75220 | (214) 897-4999 | cebert2@jh.edu | [linkedin.com/in/celine-ebert29](https://www.linkedin.com/in/celine-ebert29)

EDUCATION

Johns Hopkins University, Krieger School of Arts & Sciences, Baltimore, MD Expected May 2029
B.A. Economics, minors in Applied Mathematics & Statistics, Financial Economics, Accounting & Financial Management **GPA:** 3.91/4.00
The Hockaday School, Dallas, TX May 2025
High School Diploma **SAT:** 1530/1600 **GPA:** 4.00/4.00
Honors & Awards: Dean's List, Bank of America Make A Play National Case Competition Finalist 2026 (2/675), A-Level Capital Top
Sourcing Analyst (1/200+ applicants), Columbia University 2x National Silver Crown Award Recipient, 4x President's Gold Service Award

PROFESSIONAL EXPERIENCE

Johns Hopkins University Endowment Baltimore, MD
Incoming Full Endowment Intern August 2026
NGP Energy Capital Management Dallas, TX
Valuation Analyst June 2026 - August 2026

- Executed the Q2 valuation and reporting process across seven fund vehicles spanning sustainable real assets and natural resources; authored portfolio company valuation commentary and highlights distributed to limited partners, and built the valuation kickoff calendar
- Updated firm-wide price deck and quarter-end MTM hedge inputs; refreshed basin-level trading comps and precedent transactions, recalculating FDSO from 10-K and 10-Q filings with RSU and option adjustments
- Produced the quarterly portfolio company track record report distributed LPs, sourcing classifications, performance metrics and KPIs from the valuation process; the report serves as a core diligence deliverable for prospective investors evaluating new fund launches
- Built an AI valuation template review tool used by the full valuation team and an LP sourcing engine for Fund XIV opportunities

Institute for Applied Economics Baltimore, MD
Monetary Team Vice Chief December 2025 - Present

- Selected as one of four following a rigorous interview to join the research team analyzing consumer price indexes and money supply under Professor Steve Hanke, former economic advisor to President Reagan; wrote weekly Fed Funds rate memorandums
- Authored 20-page research paper examining the historical influence of monetary policy on IPO activity, with the intention to publish in *Studies of Applied Economics* series under the guidance of US Department of the Treasury economist, Kurt Schuler
- Produced detailed memorandums that analyzed monetary and financial statistics released by nine countries in a time-sensitive manner

A-Level Capital Baltimore, MD
Associate February 2026 - Present

- Earned one of nine from 200+ applicants; evaluated investment decisions for \$5M AUM fund, 40+ portfolio companies and 10+ exits
- Conducted end-to-end diligence on 50+ early-stage startups within the Johns Hopkins ecosystem, evaluating market sizing, competitive dynamics, and financial viability by leading founder calls and presenting memos to 20+ fund associates and partners
- Published article and delivered a thesis presentation on grid-scale battery-storage with a focus on infrastructure and software innovations

BFS Advisory Group Dallas, TX
Wealth Management Intern June 2025 - August 2025

- Co-authored Q3 risk and opportunities analysis market report with CEO that informed 430+ clients on the global and US macro landscape, US bond market, and US equity market to support the Q3/Q4 recommendation process
- Led firm-wide CRM platform transition using Excel and Juncture to improve workflow by cleaning 8,000+ client data values, organizing 400+ clients' financial statements and agreements, and moving 1,000+ transition files to the CRM server locations
- Shadowed weekly executive investment committee meetings, including the firm CEO and Portfolio Analyst, gaining exposure to fund allocation decision-making, and reviewed clients' financial documents including insurance, trust, and will filings

LEADERSHIP AND EXTRACURRICULAR

NCAA Varsity Volleyball Baltimore, MD
Starting Right Side Hitter August 2025 - Present

- Started every game as a first-year, recording second most kills on the team; one of two freshmen on the All-Conference Team, All-Region Team, Centennial Conference Champions; NCAA D3 Volleyball Championships Sweet Sixteen
- Team representative on the Student-Athlete Advisory Committee; trained five times a week for two hours daily with games twice a week

Make A Play Foundation Bank of America Winter Fellowship Remote
Winter Investments Fellow January 2026 - Present

- Ranked top 20 nationally out of 654 fellows in a ten-week investment banking program; selected among top 1% for the Pro Fellow Bowl
- Led acquisition thesis for Bank of America's Health Care Coverage Group Case Competition, analyzing synergies, valuation drivers, and deal rationale across weekly mock interviews in valuation and transaction analysis; placed 2nd and named Most Valuable Presenter

Student-Athlete Investment Fund Baltimore, MD
Co-Founder, Chief Economist March 2026 - Present

- Founded a long-only investment team managing \$200K+ of the university endowment; reinvested realized gains into Athletic Department initiatives; developed investment policy statement, analyst training curriculum, and recruited 40+ members

SKILLS & INTERESTS

Skills: Bloomberg Market Concepts Certification, Microsoft Excel & Powerpoint, Google Colab, Java Script, Pitchbook
Early Insights: Point72 Academy Spring Session Cohort, Bank of America MAP Fellowship, Stout's Future Leaders in Finance Program
Interests: Short Film Creator, Travel Magnet Collector, Sports Highlight Editor, Alpha Phi, Flower Arrangements, Dallas Stars

Charles J. Almeida

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EDUCATION

University of Pennsylvania – Philadelphia, PA

Expected Graduation: May 2029

Major: Economics | Wharton Minor: Consumer Psychology | **GPA:** 3.81/4.0 | **SAT:** 1530

Columbia Business School – Remote

AI for Business and Finance Program

Awards/Accomplishments: Student Athlete - Sprint Football, Grata Scholar with Distinction

Relevant Coursework: Accounting and Financial Reporting, AI for Business and Finance, Microeconomics, Macroeconomics, Mathematics of Change (Applied Calculus), Negotiations

Organizations: Varsity Sprint Football Team, Wharton Investment and Trading Group, Penn Athletics Wharton Leadership Academy, Eagles Autism Foundation College Program at Penn, Classroom Champions, Young Quaker Athletics, Phi Delta Theta Fraternity

PROFESSIONAL EXPERIENCE

UBS

Treasurer | Recruiting Director | Advertising Director

New York, NY

10/2022 – 06/2025

- Pennsylvania FBLA State Qualifier (×2) in competitive business events
- Managed chapter financial operations by coordinating funding for chapter events and travel and collecting student dues
- Led recruitment and marketing initiatives for the FBLA chapter, designing campaign posters and social media posts, leading informational sessions at club fairs, and working with school administration to facilitate engagement within the student body

MAP x Morgan Stanley

Spring Investment Banking Fellow

Remote

03/2026 – Present

- Selected as 1 of 50 NCAA athletes nationwide (10% acceptance rate from 500+ applicants) for a MAP Fellowship focused on Investment Banking career preparation, gaining access to industry mentors and hands-on training in core finance concepts
- Expected to complete 10+ hours of rigorous individual coursework in technology M&A strategy, including in-depth analysis of SaaS metrics, valuation comps, and roll-up acquisition models, with direct application to real-world deal scenarios

Wharton Investment and Trading Group (WITG)

Member

Philadelphia, PA

02/2026 – Present

- Attend weekly meetings to exchange ideas on analyzing capital markets and recent finance and investment news
- Conduct independent company-specific and industry-specific research in order to develop and practice the analytical skills of investment professionals while gaining exposure to investment methodologies to expand on financial knowledge
- Participate in networking events focused on finance careers while building relationships within Wharton's finance community

LEADERSHIP AND COMMUNITY DEVELOPMENT

Eagles Autism Foundation College Program at Penn

Founder and President

Philadelphia, PA

Fall 2026

- Worked directly with the Philadelphia Eagles Autism Foundation and University of Pennsylvania administration to found and start a college club at Penn designed to raise funds and support the Eagles Autism Foundation
- Secured university approval after comprehensive start-up and preparation efforts, coordinating and organizing general body recruitment and leadership council, building momentum for a fall semester 2026 rollout launch of the club

Penn Athletics Wharton Leadership Academy

Member

Philadelphia, PA

10/2021 – 06/2025

- Led monthly committee meetings to organize volunteer opportunities and gain sponsors to boost event participation
- Conducted door-to-door outreach to engage directly with members of the community, communicating the organization's mission and encouraging participation and contributions to support our local relationships and to overall support our initiatives

University of Pennsylvania Varsity Sprint Football

Student Athlete

Philadelphia, PA

08/2025 – Present

- Earned a starting position as a freshman, while successfully balancing rigorous academics, athletics, and extracurriculars
- Proactively sought out opportunities to learn the entire defensive system, consistently analyzed weekly game film to evaluate individual and team performance, identify areas of improvement, and actively contribute to the overall preparation of the team

Classroom Champions

Student Mentor

Philadelphia, PA

03/2023 – 06/2025

- Founded and organized an annual "fan bus" at my high school to attend and support our special needs athletes
- Led full event operations: logistics planning, communication with school administration and CCJSO staff, and promotion
- Developed and executed marketing strategy while managing merchandise production and ticket sales operations, generating \$2,000+ in revenue that was donated directly to support Chester County Junior Special Olympics (CCJSO) athletes

SKILLS & INTERESTS

Skills: PowerPoint, Canva (basic design), Google Suite, Basic Python Coding

Claire Mao

Mobile: +1 (408) 621-3226 | Saratoga, CA | claire_m@mit.edu | [Linkedin.com/in/clairemao888/](https://www.linkedin.com/in/clairemao888/)

EDUCATION

Massachusetts Institute of Technology

Bachelor of Science in Artificial Intelligence and Decision Making

Cambridge, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 5.0/5.0
- **Honors/Awards:** Earned Physics Bowl Division II Global Top 100 and British Biology Olympiad Gold (Top 5% globally), Qualified 2× for AIME (AMC 12 Distinction), U.S. President's Volunteer Service Award – Gold for 300+ Hours of Service
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 09/2026)

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow

Remote

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Klarna — *AI-Driven Digital Banking & Global Payments Platform (FinTech M&A / Capital Markets & Strategic Advisory Simulation)*
 - Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Execution Phase for a deal team of 5, building Klarna's valuation/transaction analysis for a live recommendation to UBS Directors **Andrew Heller** | **John Delgado** | **Stephen Saville**
 - Built a 2024–2028 financial forecast and valuation analysis benchmarking Klarna against 4 public peers—Affirm, Block, Adyen, PayPal—using revenue growth/profitability/operating assumptions to evaluate performance and establish a defensible valuation
 - Assessed 3 core transaction risks spanning profitability, BNPL regulation and credit/funding volatility, incorporating U.S. and EU regulatory frameworks and scenario-based mitigants to pressure-test Klarna's banking expansion + support team final thesis

Ratel Consulting LLC

Associate Consultant

Cambridge, MA (Hybrid)

Nov 2025 – May 2026

- Advised 1 external client on strategic and operational challenges, conducting structured research and analysis to develop executive-ready recommendations that strengthened stakeholder decision-making, business planning, and long-term org. effectiveness
- Built and delivered 5+ client-facing presentations, translating quantitative and qualitative findings into clear strategic narratives while owning problem definition, analysis, and final recommendations that aligned with professional consulting standards & expectations

UCSC ECE Quantum Communication Research

Research Assistant

Santa Cruz, CA

Feb 2024 – Jun 2025

- Researched BB84 quantum communication protocols across 10+ simulation scenarios, evaluating error detection, security performance & communication reliability to generate insights that strengthened understanding of quantum data transmission systems
- Programmed quantum circuits using Python and Qiskit to model noise and error rates across 5+ operating conditions, synthesizing findings into technical documentation that improved cross-disciplinary collaboration between physics and engineering stakeholders

Innosilicon

CAD Engineering Intern (Part-Time)

Remote

Jan 2023 – Jun 2025

- Supported CAD infrastructure and EDA tool environments used by 10+ engineers, maintaining system reliability and accessibility that improved design productivity and reduced workflow disruptions across ongoing hardware development and verification projects
- Executed 15+ engineering support initiatives spanning data organization, design verification, troubleshooting, and documentation, collaborating with cross-functional teams to enhance operational efficiency/accelerate project turnaround times across multiple cycles

Office of Saratoga Mayor & CA State Assemblyman

Civic Intern

Saratoga, CA

Jun 2024 – Aug 2024

- Supported 10+ policy research, campaign, and community outreach initiatives across a local government district, synthesizing information and coordinating stakeholder engagement efforts that strengthened civic participation, public awareness & social impact
- Designed marketing materials and coordinated logistics for 5+ community events, increasing visibility and encouraging youth involvement in public service through targeted outreach, stakeholder engagement, community-building initiatives, and civic leadership

LEADERSHIP & COMMUNITY DEVELOPMENT

MIT Women's Swimming & Diving Team | [News](#)

NCAA Student-Athlete

Cambridge, MA

Aug 2025 – Present

- Dedicate 20+ hours weekly to NCAA Division III swimming practices, competitions, strength training, and team activities while balancing rigorous academic commitments, demonstrating discipline, time management, and resilience in highly competitive settings

Make-A-Play Foundation

Professional Development Fellow

Remote

Jan 2026 – Feb 2026

- Selected as 1 of 50 athletes nationwide from 500+ applicants (10% acceptance) for a Bank of America-sponsored investment banking fellowship, completing a 3-week program with 20+ hours of targeted behavioral/technical interview preparation for a career in finance

Saratoga Swim Aquatics

Swim Coach

Saratoga, CA

Jun 2024 – Aug 2024

- Coached 50+ youth athletes in competitive swimming, developing technical skills, discipline, and accountability through structured training programs that strengthened athlete performance, confidence, long-term competitive development & continuous improvement

NON-TECHNICAL SKILLS & INTERESTS

Language(s): Chinese (fluent), Spanish (limited proficiency) | **Programs:** Python, Java, C++

Interests: Competitive Swimming, Journalism, Piano & Clarinet, Skiing & Snowboarding, Singing

Clayton T. Green

Mobile: +1 (720) 520-3236 | Westminster, CO | clayton.green@stern.nyu.edu | [Linkedin.com/in/claytongreen](https://www.linkedin.com/in/claytongreen)

EDUCATION

New York University

Bachelor of Arts in Economics

New York, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0 | **SAT:** 1550
- **Honors/Awards:** NCAA DIII Student-Athlete, Dean's List, National Merit Scholar, Seal of Biliateracy
- **Relevant Courses:** Principles of Financial Accounting, Intro to Financial Services, Statistics for Business, Microeconomics with Calculus, Wall Street Prep Accounting & Financial Statement Analysis (completed 09/2026)

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow & Team Captain

Remote

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Temenos — *Cloud-Based Banking Software & Financial Technology Platform (Technology M&A / Capital Markets + Strategic Advisory Simulation)*
 - Selected as 1/12 captains from 594 NCAA athletes (top 2.0%) to lead a 5-person deal team through 6 weekly workstreams, presenting Temenos as a European banking software acquisition target for an institutional U.S. PE client live to UBS on Aug. 17
 - Assessed a \$540B global AI market, \$82B European AI opportunity and 3 priority end markets using 5+ reputable sources, connecting banking adoption, enterprise productivity + agentic AI demand to frame team's market view & guide diligence work
 - Benchmarked Temenos' 3,000+ financial institution clients and subscription-based banking platform against 3 peers, incorporating findings into a 12-page pitch book while applying 20+ hours of Wall Street Prep accounting to support our thesis

Antero Resources Corporation

Summer Finance Intern

Denver, CO

May 2026 – Aug 2026

- Modeled \$950M of projected cost synergies from Antero's \$2.8B acquisition by evaluating midstream infrastructure integration and G&A savings, supporting the management team's real assessment of value creation opportunities and post-merger operating priorities
- Built comparable valuation analyses across 15+ E&P operators while forecasting 5B+ cubic feet per day of AI-driven data center demand, connecting energy market fundamentals with acquisition opportunities to support strategic growth discussion across the firm

Becker Garland Actuarial

Summer Data Analyst

Broomfield, CO

Jun 2025 – Aug 2025

- Analyzed 10+-figure corporate payrolls and workers' compensation loss trends using Excel to estimate annual and ultimate losses, producing data-driven analyses that improved accuracy & consistency of client risk assessments across multiple insurance engagements
- Researched and authored a 600-word article on third-party litigation funding while completing weekly Excel workshops with firm leadership, expanding technical proficiency + translating complex insurance topics into client-focused insights for our monthly readers

LEADERSHIP & COMMUNITY DEVELOPMENT

New York University | Men's Varsity Baseball | [News](#)

Recruited Baseball Player

New York, NY

Sep 2025 – Present

- Commit 40+ hours a week to practice, games, speed and strength training, active recovery, travel & individual performance reflections
- Facilitate state-of-the-art data collection using Trackman software to maximize mechanical training for NYU's 20-person pitching staff
- Recruited as 1st Colorado-born baseball player at NYU + 1 of 4 NCAA student-athletes in Broomfield High's graduating class of 2025

NYU Stern Capital Markets Club

Director of Outreach and Corporate Communications & Workshop Member

New York, NY

Sep 2025 – Present

- Selected as 1 of 8 students from 200+ applicants for the club's flagship finance program, completing technical workshops covering macroeconomics, valuation and capital markets while building a stronger foundation for investment banking recruiting opportunities
- Organize networking events and corporate outreach initiatives while participating in 10 technical workshops, supporting recruiting efforts that contributed to 8 sophomores earning summer internship offers + stronger employer engagement across the organization

NYU Stern Net Impact

Mentorship Program Member

New York, NY

Sep 2025 – Dec 2025

- Selected as 1 of 36 students from 250+ applicants for a leadership mentorship program, participating in a 12-week curriculum focused on sustainability, professional development and community engagement across greater New York City with peers from across campus
- Coordinated a community service initiative collecting, restoring and donating 8 bags of athletic equipment valued at \$3,000+, expanding access to youth sports while strengthening partnerships with local nonprofits to support the growth of local youth sports

Future Business Leaders of America

President & CFO

Broomfield, CO

Aug 2024 – May 2025

- Led a chapter of 50+ members by presenting weekly competitive strategy sessions while managing a \$15,000+ operating budget, supporting member engagement and enhancing preparation for state and national business competitions throughout the academic year
- Earned 2nd place among 50+ competitors in Colorado's Accounting I competition to qualify for nationals, demonstrating financial analysis, accounting knowledge & composure in a highly competitive academic environment against several top statewide competitors

NON-TECHNICAL SKILLS & INTERESTS

Skills: Financial Modeling, Microsoft Office (Excel + PowerPoint), Capital IQ, Bloomberg Terminal | **Languages:** Spanish (Conversational, Seal of Biliateracy) | **Interests:** Denver Broncos, Dostoevsky, Fantasy Football, Philosophy, Pickleball, Roman Empire, Wakesurfing, Whoop | **Programs:** QuickBooks Online Certified User, Volunteer Youth Baseball Coach

Connor J. Simkiss

Connor.Simkiss@tufts.edu | (267)-576-3482 | www.linkedin.com/in/connor-simkiss | Boston, Ma

Education:

Tufts University

Medford, MA

B.A. in Quantitative Economics, Minors in Finance & Applications of AI

Expected Graduation: May 2029

- **Cumulative GPA:** 3.75/4.00
- **Activities:** Varsity Football, Army ROTC, Economics Society, Tufts Financial Group, Big Brothers Big Sisters

Professional Experience:

Bank of America X Make a Play Foundation

Remote

Investment Banking Fellow

Jan 2026 – May 2026

Selected Transaction Experience

- Delcath Systems — *Oncology Drug-Delivery Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Led the planning phase for a 5-person deal team, analyzing four healthcare market drivers to develop an industry thesis on Delcath's growth potential and key investment risks
 - Assessed demographic trends, U.S. healthcare spending, and growing adoption of healthcare technology to support projections for treatment demand and long-term revenue growth
 - Evaluated funding conditions, cash position, and profitability outlook, highlighting Delcath's approximately \$88.9M net cash balance as a source of financial flexibility during commercialization
 - Presented a 10-page investor deck, 1-page fact sheet, and due diligence questionnaire to Bank of America leadership; defended assumptions related to revenue growth, margins, and capital structure

Ten Acre Holdings

Wayne, PA

Private Investment Intern

Jun 2026-Present

- Supported post-acquisition value creation initiatives for a newly acquired specialty contracting business by conducting operational diligence across ERP, CRM, estimating, scheduling, and project management systems to identify technology gaps limiting scalability
- Developed a technology optimization framework evaluating software platforms and process improvements, delivering strategic recommendations to modernize operations, improve customer workflows, and enhance organizational efficiency

Simkiss Services

Doylestown, PA

Co-Owner and Operator

Apr 2020-Present

- Founded and scaled a residential power washing and landscaping business, managing sales, pricing, scheduling, and service execution to acquire 100+ clients and generate \$50K+ in revenue through disciplined cost control and repeat-customer retention
- Designed targeted outreach and referral strategies to expand local market penetration, optimizing route density, job sequencing, and equipment utilization to improve margin per job and sustain steady year-over-year growth in a competitive services market

Leadership & Professional Development

Tufts Varsity Football

Medford, MA

NCAA D-III Student-Athlete, Linebacker

Jun 2025-Present

- Commit 25+ hours weekly to film analysis, defensive scheme execution, practice, competition, and strength programming, translating coaching strategy into on-field adjustments while balancing academic responsibilities and team leadership standards
- Analyze opponent tendencies through structured film study and position-group review, reinforcing play recognition and defensive alignment while contributing to cohesive unit execution in a nationally competitive Division III football program

Big Brothers Big Sisters of Eastern Massachusetts

Somerville, MA

Big Brother & Youth Mentor, Somerville Neighborhood School

Sep 2025-Present

- Provide weekly 1:1 mentorship to an elementary student, designing structured academic and social-emotional development sessions that reinforce confidence, goal setting, and classroom engagement while serving as a consistent collegiate role model
- Coordinate with BBBS program staff and school personnel to track progress, adapt activity plans, and address behavioral or academic needs, strengthening accountability across stakeholders and supporting measurable long-term youth development outcomes

United States Army ROTC

Cambridge, MA

MS2- Cadet & Scholarship recipient

Aug 2025- Present

- Selected for a competitive national Army ROTC scholarship and train within the MIT Paul Revere Battalion, developing foundational leadership and tactical decision-making skills through weekly military science instruction, physical readiness training, and field exercises
- Apply structured leadership frameworks during drills and team-based simulations, strengthening communication under pressure, situational awareness, and accountability while operating in high-performance environments that demand discipline and adaptability

Additional Skills & Interests

Skills: Microsoft Excel, Microsoft PowerPoint, Microsoft Word, Pitchbook

Honors & Awards: Kyle Bernard Memorial Scholarship, Eric Knorr 3D award for Dedication, Desire and Devotion, Jumbo Pride Player of the Year, Boston Marathon finisher, AP Scholar (‘24-25), DECA Financial Literacy State Qualifier, Wall Street Prep LBO, M&A Modeling & Accounting Certification, Boston Marathon Rucker

Interests: Philadelphia Sports Fan, Steak Connoisseur, Car Enthusiast, Golfing, Skiing, Watches

CONNOR WILKES

859-382-2478 | cwilkes5@jh.edu | <https://www.linkedin.com/in/connor-wilkes-7874a1333/>

EDUCATION

Johns Hopkins University, KSAS

Expected May 2029

Bachelor of Arts in Economics and Applied Mathematics & Statistics

Cumulative GPA: 3.77/4.00

- Minors: Accounting and Financial Management, Financial Economics
- Relevant Coursework: Calculus III, Microeconomic Theory, Financial Accounting

Indian Hill High School,

May 2025

- Magna Cum Laude, National Honor Society

Cumulative GPA: 4.75/4.00

PROFESSIONAL EXPERIENCE

Economic Intelligence Group Co-Chief | Baltimore, MD

Jan 2026 – Present

Institute for Applied Economics, Global Health, and the Study of Business Enterprise

- Devoted 10+ hours weekly under Professor Steve Hanke, former senior economic advisor to President Reagan.
- Evaluated global financial markets and macro trends to support Prof. Hanke's media appearances, publications, and public analysis for a high-visibility Twitter account with an audience exceeding 850,000 followers.

Ocean Leap Capital | San Francisco, CA

May 2026 – Present

- Conducted due diligence, operational analysis, and private equity research for potential acquisitions with a focus on technology and healthcare companies.
- Built financial models for a senior living acquisition worth over \$50MM.

Marshal L. Salant Investment Team | Baltimore, MD

Feb 2026 – Present

- Conducted equity research and valuation analysis for a student-managed endowment portfolio of over \$500,000 that has outperformed the S&P 500 since inception.
- Developed and presented investment updates and pitches to critical audiences.

Johns Hopkins Scholars in Finance

Feb 2026 – Present

- Engaged in a preparatory financial club with hands-on experience, customized training, and senior mentorship
- Competed in national-level stock pitch competitions, including equity analysis and financial modeling.

Make A Play Foundation (MAP)

Jan 2026 – Present

- Selected as 1 of 50 NCAA athletes nationwide (10% acceptance rate from 500+ applicants) for a 10-week investment banking fellowship sponsored by Bank of America.
- Collaborated with student-athletes from 15+ top universities to produce sponsor-evaluated pitch materials, integrating behavioral and technical feedback under simulated deal pressure.

INTERCOLLEGIATE SPORTS AND LEADERSHIP

Johns Hopkins Varsity Men's Soccer | Baltimore, MD

Aug 2025 – Present

- Competed at the NCAA DIII level while balancing a full academic schedule.
- Demonstrated discipline and time management through 30+ hours/week of training, travel, and competition.
- Performed within a high-pressure, result-driven environment to execute game plans in real-time.

SKILLS, ACTIVITIES & INTERESTS

Languages: English (Native/Fluent), Spanish (Intermediate Proficiency)

Skills: Data Analysis, Research, Market Analysis, Teamwork, Leadership

Activities & Interests: Athletics, Geopolitics, Cooking, Chess, Poker

Certificates: Bloomberg Market Concepts, Accounting and Financial Statement Analysis (Wall Street Prep)

DAVID THOMPSON

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EDUCATION

Columbia University, Columbia College

Bachelor of Arts in Financial Economics & Computer Science

New York, NY

Class of 2029

- Cumulative GPA: 3.73/4.00; Dean's List (Spring 2026)
- Relevant Coursework: Financial Accounting, Principles of Economics, Intermediate Microeconomics, Statistics, Intro to Java

WORK EXPERIENCE

Make a Play Foundation x UBS

Investment Banking Summer Fellow

New York, NY

Jun 2026 - Present

- Selected as 1 of 100 NCAA athletes nationwide (15% acceptance rate from 650+ applicants) for MAP's Money Ball Fellowship sponsored by UBS, focused on investment banking recruiting, technical preparation, and cross border private equity strategy
- Network with UBS investment banking professionals to gain exposure to M&A execution, private equity dynamics, valuation frameworks, and expectations for analyst-level performance in global banking environments
- Engage in a live case competition with 4 other summer athletes to recommend an emerging European consumer technology company for a U.S.-based private equity acquisition, analyzing FX exposure, leverage strategy, market entry dynamics, and operational scaling opportunities

Columbia Alpha Partners

Analyst, Investment Banking Division

New York, NY

Sep 2025 - Present

- Selected as 1 of 12 analysts from 300+ applicants through a two-round interview covering accounting, DCF methodology, and financial statement analysis
- Built a fully integrated 3-statement model with 10-year projections for a \$6.4B take-private acquisition of Maxar Technologies – modeling revenue growth across product and service segments, capex, and free cash flow
- Constructed a DCF, public comparables and precedent transaction analysis to derive independent enterprise valuation across multiple M&A and capital-raising case studies
- Placed top 5 of ~40 teams at the Morningside Stock Pitch Competition judged by portfolio managers from local investment firms

Decathlon AG2R La Mondiale

Professional Cyclist, Development Team

Chambéry, France

Aug 2023 – Jul 2024

- Contracted to the development squad of a UCI WorldTour organization – one of fewer than 20 elite professional cycling teams in the world
- Achieved 2nd place at the UCI Cyclocross World Cup in Troyes – the joint-best result by an American in World Cup cyclocross history
- Tracked six daily performance metrics across 30+ race events using TrainingPeaks and VeloViewer to calibrate race-day strategy and optimize training load
- Built sector-by-sector wattage plans for time trial stages using course profiling and aerodynamic modeling, generating predicted finish times benchmarked against historical data
- Selected as designated race leader on key stages to direct multi-national teammates in real time to execute a shared race strategy under competitive pressure

LEADERSHIP

Columbia Heavyweight Men's Rowing – NCAA Division I

Student-Athlete

New York, NY

Sep 2025 – Present

- Committed 35+ hours per week year-round to training and competition while maintaining a 3.73 GPA across a Financial Economics and Computer Science double major

Euro Cross Academy

Volunteer Coach

USA

June 2023 – July 2024

- Mentored 40 aspiring national team cyclists on European racing logistics, professional development, and race strategy drawing on firsthand experience of the European circuit

USA Cycling National Team

Elite National Team Cyclist

USA/EU

December 2022 – June 2024

- 4x National Champion (Cyclocross: 2016, 2021, 2023; Time Trial: 2022) and 2x Pan American Champion (Cyclocross: 2022, 2023)
- Represented the United States in four UCI World Championships across cyclocross, road, and time trial disciplines

ADDITIONAL INFORMATION

Skills: Excel, PowerPoint, Python, Java

Certifications: Bloomberg Market Concepts, WSO Investment Banking Course

Interests: Investing, Cycling, Distance Running, Pickleball, Reading

David K. Youngwood

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EDUCATION

Washington and Lee University (W&L)

Bachelor of Arts in Economics & Politics

Lexington, VA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.965/4.0
- **Honors/Awards:** W&L Presidents List, W&L Scholar Athlete (Varsity Baseball), Academic All-ODAC
- **Relevant Courses:** Principles of Microeconomics, Principles of Macroeconomics, Calculus I
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 09/2026)

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow

Remote

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Kraken — *AI-Powered Utility Software & Energy Technology Platform (Technology M&A / Capital Markets & Strategic Advisory Simulation)*
 - Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Planning Phase for a deal team of 5, building Kraken's financial summary and operating KPI analysis for a final recommendation to UBS Directors: **Andrew Heller & John Delgado**
 - Built a banker-style financial summary evaluating Kraken's \$500M+ contracted ARR, 18% LTM EBITDA margin, estimated 22% 2026E EBITDA margin + net cash position, benchmarking 2 public SaaS peers to establish team's investment framework
 - Developed 2 analyst-level presentation slides summarizing market trends and financial performance, applying 20+ hours of Wall Street Prep accounting coursework to create the analytical foundation guiding Execution, Control and Monitoring workstreams

VeloU

Intern

Pleasantville, NY

May 2026 – Aug 2026

- Evaluated athlete performance using 3+ sports science technologies, including ForcePlates, laser timing systems and ArmCare, identifying performance trends and injury risk factors that support individualized training decisions + long-term athletic development
- Analyzed movement patterns, recovery metrics and testing data across 100+ athlete assessments to recommend evidence-based adjustments, improving strength, mobility and return-to-play strategies while supporting more informed coaching decisions/outcomes

New York League of Conservation Voters

Politics Intern

New York, NY

Jun 2025 – Aug 2025

- Researched 25+ local and state environmental policy initiatives to support candidate endorsement decisions, evaluating sustainability legislation and regulatory priorities that strengthened organizational advocacy and policy recommendations across NYC communities
- Tracked legislative activity across 20+ municipalities while synthesizing policy research into reports presented to senior leadership, supporting strategic advocacy campaigns and expanding public engagement around environmental policy initiatives through outreach

Bulldog Ball Club

Camp Counselor

Long Island, NY

Jun 2022 – Jul 2022

- Led baseball instruction for 40+ K–2 campers by designing age-appropriate drills, organizing daily practice stations and reinforcing teamwork fundamentals, creating a structured learning environment that built athletic confidence/encouraged consistent development
- Coordinated daily camp operations for 5+ instructional stations by preparing equipment, managing activity rotations & maintaining an organized practice schedule, improving session efficiency while ensuring every camper remained actively engaged throughout the day

LEADERSHIP & COMMUNITY DEVELOPMENT

Training the Street

Financial Modeling & Data Analysis Researcher

Lexington, VA

May 2026 – Present

- Complete 20+ hours of financial modeling, valuation, Excel and Python coursework through Training the Street, building technical skills used to analyze companies, construct financial models & support investment banking decision-making across multiple industries

Washington and Lee University Varsity Baseball

NCAA Division III Student-Athlete & Pitcher

Lexington, VA

Sep 2025 – Present

- Commit 30+ hours weekly to NCAA Division III baseball through practices, competition, film review and team meetings while balancing rigorous academic responsibilities, strengthening discipline, resilience and performance under pressure for the entire season
- Contribute to team culture by participating in leadership initiatives and community service projects supporting 100+ Rockbridge County residents, reinforcing accountability, teamwork, communication, and service beyond athletic competition both on/off the field

Earth Action Leader

Varsity Baseball Representative

Lexington, VA

Sep 2025 – Present

- Collaborate with 10+ university leaders through Washington and Lee's Green Athletics program to coordinate sustainability initiatives, expanding environmental outreach while increasing student-athlete participation in campus conservation efforts across entire campus
- Support campus sustainability programming by representing the varsity baseball team in 5+ Green Athletics initiatives, strengthening collaboration between athletic & university leadership while promoting greater environmental awareness across the student community

NON-TECHNICAL SKILLS & INTERESTS

Skills and Programs: Proficient in Microsoft Word, Excel, PowerPoint, Java, and SQL; working knowledge of Python

Languages: English | **Interests:** Minor League Baseball, AI, Chess, Current Events, Music

Dominick L. Ducree

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EDUCATION

Middlebury College

Bachelor of Arts in Economics

Middlebury, VT

Expected Graduation: May 2029

- **Cumulative GPA:** 3.8/4.0
- **Honors/Awards:** NCAA DIII Student-Athlete, Posse Foundation Full-Tuition Leadership Scholar (1/10 selected from 3,000+)
- **Relevant Courses:** Macroeconomics, Microeconomics, Calculus, Wall Street Prep Accounting & Financial Statement Analysis

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow; Team Captain

Remote

Jun 2026 – Sep 2026

Selected Transaction Experience

- Eye Security — *AI-Powered Cybersecurity & MDR Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1 of 12 NCAA athletes from 594 participants (top 2.0%) to lead a 4-person deal team as Captain through 6 weekly phases, presenting Eye Security as an acquisition target for a hypothetical U.S.-based PE client live to UBS bankers on 08/17/26
 - Identified Eye Security as a European MDR/cybersecurity acquisition target by sizing a \$227.6B global TAM, \$20.7B European SAM and \$254M mid-market SOM, using 8+ industry sources, establishing the foundation of the team's thesis.
 - Co-designed a 12-page investment pitch book by benchmarking Eye Security's growth trajectory, 270-employee operating scale & proxy financial models, applying 20+ hours of Wall Street Prep accounting work to support the team's valuation assumptions

Final Mile X

Operations Associate

Hinsdale, IL

May 2024 – Aug 2026

- Managed high-volume logistics for perishable and high-value goods across the Chicago market while maintaining 100% order accuracy, consistently coordinating time-sensitive deliveries under strict deadlines to improve operational reliability and overall client satisfaction
- Coordinated daily shipment workflows across 20+ delivery schedules by prioritizing urgent requests, communicating with stakeholders & regularly resolving logistical issues, enabling consistent execution in a fast-paced distribution environment with minimal disruptions

DePaul University Summer Investment Challenge

Investment Research Participant

Chicago, IL

Jun 2024 – Jul 2024

- Selected for a competitive finance immersion program, building a full equity pitch on Lantheus Holdings (NASDAQ: LNTH) by conducting comparable company analysis across the nuclear medicine and radiopharmaceutical industry to evaluate relative valuation
- Utilized Bloomberg Terminal and Excel to model Lantheus Holdings' financial performance, forecast revenue drivers and assess valuation assumptions, presenting recommendations before a panel of 5 finance professionals while defending work through live Q&A

LEADERSHIP & COMMUNITY DEVELOPMENT

Middlebury Varsity Men's Basketball | [News](#)

NCAA Division III Student-Athlete

Middlebury, VT

Sep 2025 – Present

- Commit 20+ hours weekly to NCAA Division III basketball through practices, film study, strength training, travel and competition, balancing a rigorous academic workload while building discipline, time management & execution in high-pressure team environments
- Contributed as a freshman on a nationally competitive program, highlighted by 23-point performances—including the game-winning three-pointer in a 73-72 comeback victory over Union—demonstrating confidence & composure in high-leverage/pressure moments

Middlebury College Student Investment Committee

Analyst

Middlebury, VT

Sep 2025 – Present

- Evaluate companies across industry sectors through fundamental research, financial statement analysis and relative valuation, developing investment theses that support portfolio discussions + inform committee investment decisions across the entire portfolio
- Present buy and sell recommendations on 10+ portfolio holdings by evaluating companies alongside public peers, using valuation analysis and industry research to support investment discussions and contribute thoughtful perspectives during committee meetings

SEO Career (Sponsors for Educational Opportunity)

AIIB Edge — Alternative Investments & Investment Banking Track Fellow

New York, NY

Feb 2026 – Present

- Selected for SEO's highly competitive AIIB Edge program, completing 20+ hours of financial modeling, valuation and technical interview preparation, expanding technical finance capabilities while preparing for competitive recruiting opportunities across finance
- Learn directly from finance professionals through structured coaching on valuation, institutional markets and recruiting strategy, applying feedback across 10+ technical sessions to elevate analytical thinking/professional communication and prepare for interviews

Meals on Wheels

Volunteer

Schaumburg, IL

May 2022 – May 2026

- Prepared and distributed nutritious meals during 50+ volunteer service hours by ensuring accuracy, quality and timely delivery, supporting efficient operations while helping provide reliable nutrition for seniors and community members across the broader region
- Built lasting relationships with clients through regular visits and consistent service, communicating with 20+ community members in a compassionate and professional manner that fostered trust and enhanced the overall volunteer experience for all of those participating

NON-TECHNICAL SKILLS & INTERESTS

Technical: Microsoft Office Suite (Excel, PowerPoint), Bloomberg Terminal | **Activities:** Middlebury Diversity in Business, Middlebury Black Student Union | **Interests:** Sports, Music, Fashion, Acting, Books, Poetry, Food, and Movies

Edgar CBC Thielens

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EDUCATION

Cornell University

Ithaca, NY

Bachelor of Science in Mechanical Engineering | Minor in Business for Engineers

Expected Graduation: May 2029

- **Honors/Awards:** NCAA Division 1 Student-Athlete (Track & Field), Ivy League Champion
- **Additional Coursework:** Preparatory Courses in Science and Engineering at Delft University of Technology
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 07/2026)

PROFESSIONAL EXPERIENCE

Morgan Stanley

Remote

MAP Investment Banking Fellow; Team Captain

Mar 2026 – Jul 2026

Selected Transaction Experience | [Pitch Book](#) | [Client Presentation](#) | [Final Recommendation](#)

- Mercury — Digital Banking & AI-Enabled Financial Operations Platform (Tech M&A / Strategic Advisory Simulation)
 - Selected as 1 of 10 captains from 376 NCAA athletes (top 2%) to lead a 5-person deal team, defining Mercury's platform, revenue model and customer base
 - Sized Mercury's opportunity using ~\$758B AI TAM, ~\$174B software SAM and ~\$3–4B SOM, synthesizing 4+ sources across AI automation, vertical SaaS and cloud infrastructure
 - Evaluated Mercury's positioning against 4+ peers (Brex, Ramp, Rho), identifying differentiation in deposit-led banking and AI tooling alongside key rate and regulatory risks

Bank of America

Remote

Investment Banking Fellow

Jan 2026 – Feb 2026

- Selected as 1 of 50 athletes nationwide from 500+ applicants (10% acceptance) for a Bank of America investment banking fellowship with 20+ hours of behavioral interview prep
- Competed against 654 fellows through 3 mock interviews, delivering structured responses on leadership, teamwork and conflict to sharpen executive presence under pressure

Delft University of Technology | Pre University Program

Remote

Student

Nov 2023 – May 2024

- Completed a 3-module Delft pre-university program spanning wind energy, prosthetics and biological chip design, building a working hand prosthesis model in CAD that earned selection for on-site sessions in the Netherlands

UPenn Social Innovators Program

Remote

Participant

Mar 2023 – Jun 2023

- Completed a 12-week UPenn entrepreneurship program covering venture creation and customer discovery, designing and marketing an adaptive running spike sole for athletes with minor disabilities

SNSM (French National Society of Sea Rescuers)

Ploumanac'h, Brittany, France

Intern

Jul 2026

- Authored the Ploumanac'h station's Document Unique de Prévention des Risques (DUERP), a full risk-prevention assessment covering all boathouse activities, after researching French Labour Code requirements
- Observed station operations and interviewed volunteers to identify hazards and assess likelihood/severity, translating findings into mitigation measures that reduced residual risk
- Delivered a station-wide DUERP commended by the station President (Vice-Admiral, French Navy, ret.) for rigor, now guiding safety practices for all volunteers

LEADERSHIP & COMMUNITY DEVELOPMENT

Cornell University Track & Field

Ithaca, NY

Varsity Athlete

Aug 2025 – Present

- Compete as an NCAA Division I mid-distance athlete for Cornell Track & Cross Country, building resilience and competitive discipline each season
- Dedicate 25+ hours weekly to training and competition alongside rigorous academics, demonstrating strong time management and accountability

Community Service Projects

Tuba City, AZ | Waco, TX

Vice President

Mar 2023 – Mar 2024

- Completed week-long service projects on a Navajo ranch and Texas farm, strengthening local operations and community relationships across 2 states
- Helped dig irrigation trenches, build field fencing and assist with planting, improving land functionality and daily productivity

NON-TECHNICAL SKILLS & INTERESTS

Skills and Languages: Fluent in Dutch, French and English. Intermediate proficiency in Spanish

Interests: Engineering (Automobile and Aerospace), Finance, Cycling, Rugby, Travelling (Grew up in Algeria, Malaysia, England, USA)

Eli Reuben Friend

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EDUCATION

Princeton University | Princeton, NJ |

GPA: 3.9/4.0

B.A. in Ecology and Evolutionary Biology, Minor in Judaic Studies

May 2029

- Accomplishments: Varsity Athlete Medical Society, Elected Chabad Board Chair, Leadership Board Varsity Football
- Relevant Courses: General Chemistry I and II, Molecular Biology, Calculus 1

Isidore Newman School | New Orleans, LA | SAT: 1490 |

GPA: 4.0/4.0

May 2025

- Accomplishments: Cum Laude, National Merit Finalist, Princeton Book Award, Global Seal of Bilitracy
- Leadership: Student Body Vice Chair, Lacrosse and Football Captain, Jewish Cultures Club President and Founder
- Relevant Courses: AP Chemistry, AP Biology, AP Spanish, AP US History, AP World History, AP Calculus BC

PROFESSIONAL EXPERIENCE

That's Nice | Remote | *Private Equity Research Intern*

May 2026 - Present

- Researched CDMOs and life sciences supply chain companies to identify current and historical ownership structures
- Built and maintained a private equity and venture capital database integrated with the organization's broader market intelligence platform
- Supported sales/business development initiatives through market research, ROI calculator models, and data organization

New Orleans Bio Innovation Center | New Orleans, LA | *BioFellow*

May 2026 - August 2026

- Conducted outreach to neuroscience startups, lead informational calls to answer applicant questions and guide companies through the annual Bio Challenge application process
- Performed pharmaceutical industry research on neuroscience drug pipelines, analyzing company portfolios, therapeutic areas, and competitive landscapes

Morgan Stanley | Remote | *MAP Investment Banking Fellow, Team Captain*

Mar 2026 – Present

- Selected as 1/10 captains from 376 NCAA athletes (top 2%) to lead a 5-person deal team through 6 weekly workstreams to evaluate software/AI-driven acquisition targets for a prospective PE client and deliver a live investment recommendation
- Benchmarked Stripe's competitive positioning against 4+ peers including PayPal, Adyen and Block, highlighting strengths in developer experience and global infrastructure while identifying key risks around margin pressure & competition for final thesis

Dr. Wendel Herd, Orthopedic Surgeon | New Orleans, LA | *Shadowing Experience*

August 2024 - Present

- Shadowed 8 surgeries including MCL, ACL, meniscus repair at Tulane Hospital
- Analyzed pre-operative imaging and recovery protocols to understand clinical decision-making

Powercourses | New Orleans, LA | *SAT/ACT Teacher*

June 2025 - August 2025

- Instructed classrooms of 20+ students on SAT and ACT content and test taking strategies
- Improved scores by an average of 150 points through targeted instruction, diagnostic testing, and individualized placement

LEADERSHIP/VOLUNTEER EXPERIENCE

Princeton University Varsity Football Team, | Princeton, NJ | *Quarterback*

August 2025 - Present

- Commit 20+ hours weekly for practices, travel, lift and film reviews

Princeton Chabad Board, | Princeton, NJ | *Student Athlete Chair*

December 2025 - Present

- Monitored and executed Chabad events for student athletes on a monthly basis
- Advocated for Jewish student life through weekly leadership meetings and campus initiatives

Princeton Student Athlete Wellness Leader (SAWL) | Princeton, NJ |

December 2025 - Present

- Served and trained as a peer mentor, supporting teammates' mental and physical health
- Collaborated with University psychiatrists to develop and implement mental health initiatives

Regional Youth Leader, Heart of Passion, | New Orleans, LA |

July 2024 - July 2025

- Planned and led a week-long experiential program for pediatric cancer patients from across the Southern U.S.
- Coordinated logistics with medical staff, provided one-on-one mentorship, and guided 20+ participants through New Orleans

SKILLS & INTERESTS

- Skills and Languages: Spanish and Creative Writing
- Interests: Food Journalism and SEC football

Ellie J. Burger

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EDUCATION

Brown University

Bachelor of Arts in Applied Math-Economics | Minor in Entrepreneurship

Providence, RI

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0 | **ACT:** 33
- **Honors/Awards:** AP Scholar with Distinction, AP Scholar, National Academic Squad (National Field Hockey Association)
- **Relevant Courses:** Financial Accounting, Principles of Economics, Management of Industrial and Nonprofit Organizations

PROFESSIONAL EXPERIENCE

Morgan Stanley x MAP

Investment Banking Fellow

Remote

Mar 2026 – Present

- Selected as 1/75 NCAA athletes to lead the Planning Phase for a Morgan Stanley-style case, analyzing Mercury by structuring 5+ financial inputs across revenue streams/cost drivers/KPIs to create a clear framework to guide downstream work
- Built 4+ exhibits outlining ~\$650M revenue scale, subscription-driven recurring model and growth assumptions tied to enterprise AI adoption, establishing guardrails for margin trajectory, scalability and long-term value creation across the model

QP Global Family Offices

Summer Intern

Remote

June 2026 – Present

- Supported investment research and client-facing deliverables spanning market diligence, competitive analysis, and presentation design for a boutique multi-family office.
- Produced in-depth company case studies and diagnostic analyses, applying frameworks to evaluate investment potential.

PrideRecruit

AI Intern

Houston, TX

May 2026 – Present

- Built an AI-powered recruiting platform for field hockey players looking to be recruited to collegiate programs. Leveraging domain expertise as a D1 athlete to inform product design and data accuracy.

Rushmore Resource Partners

Summer Intern

Houston, TX

Jun 2024 – Aug 2024

- Supported 3+ upstream oil & gas investment evaluations by conducting market research and synthesizing industry news, translating macro trends into actionable insights that informed acquisition strategy + strengthened deal screening process across multiple regions
- Participated in 5+ executive meetings and calls, analyzing potential projects and property acquisitions across Texas, developing commercial awareness and contributing research that supported strategic decision-making for prospective investments in the future

LEADERSHIP & COMMUNITY DEVELOPMENT

Brown University | Women's Varsity Field Hockey

NCAA Division I Student-Athlete

Providence, RI

Sep 2025 – Present

- Compete as a Division I student-athlete while balancing 20+ hours weekly of training, travel and competition, demonstrating discipline, time management and consistent performance within a highly competitive environment throughout the demanding season
- Collaborate with 24 teammates to optimize on-field communication and execution, strengthening team cohesion, accountability and performance outcomes across practices, film sessions and competitive match play against nationally ranked opponents

Freelance Private Coaching

Field Hockey Coach

Houston, TX

Jun 2021 – Present

- Built a client base of 15+ youth athletes across Houston, delivering individualized and group training sessions focused on fundamentals, game awareness and confidence to drive measurable skill development across multiple age groups and competitive levels
- Conducted 3+ weekly sessions while maintaining consistent communication with parents on progress and training goals, strengthening client relationships and improving retention through personalized coaching and feedback tailored to each athlete's development needs

Brown Business & Investment Organizations

Leadership Team (Women in Business & Entrepreneurship Program)

Providence, RI

Sep 2025 – Present

- Contributing to 10+ workshops, panels and networking events while collaborating with 5+ peers to organize corporate partnerships & on-campus programming with firms + Brown alumni
- Led 3+ large-scale initiatives including Synapse trips, Pitch@Brown and cross-university events, coordinating logistics, outreach and execution to strengthen student engagement, expand industry exposure, and support career development in finance/entrepreneurship

Cohort Member (Brown Finance Club)

- Involved in 11 workshops, panels, and networking events aimed at fostering community among students interested in finance
- Guided by 4 industry mentors to build technical knowledge, refine interview techniques, and achieve professional goals

St. John's School | Women's Varsity Field Hockey

Co-Captain

Houston, TX

Aug 2021 – Nov 2024

- Led 24 teammates as co-captain, organizing practices and mentoring 10+ underclassmen to strengthen team cohesion, accountability and performance across practices/competitive match play throughout the season during high-pressure conference competition/ travel
- Directed 2+ weeks of captain-led practices in the absence of coaches, structuring drills, managing execution and maintaining team preparedness to ensure consistent performance and discipline across training sessions ahead of key competitive matches

NON-TECHNICAL SKILLS & INTERESTS

Interests: NYT games, running, photography, hiking, cooking, card games, pickleball, puzzles | **Skills/Languages:** Excel, PowerPoint

Emma A. Fung

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EDUCATION

Wellesley College

Bachelor of Arts in Economics

Wellesley, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.5/4.0 | **ACT:** 34
- **Honors/Awards:** 2025-26 USFCA DIII All-America First Team - Foil, 2025-26 USFCA Northeast DIII All-Region - Foil
- **Relevant Courses:** Microeconomics, Macroeconomics, Probability and Stats Methods, Accounting (external)
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow; Team Captain

Remote

Jun 2026 – Present

Selected Transaction Experience

- Darktrace - *AI-Powered Cybersecurity Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/30 captains from 594 NCAA athletes (top 5.0%) to lead a 5-person deal team through 6 weekly workstreams, presenting Klarna as a European AI-driven fintech acquisition target for a hypothetical PE client in the U.S. live to UBS on 8/17
 - Analyzed ~\$1.43T global software TAM, ~\$114.9B enterprise AI SAM and ~\$19.2B European AI SOM across 3 high-growth technology subsectors using 5+ reputable sources, evaluating AI adoption, cybersecurity demand & SaaS trends to shape thesis
 - Synthesized Darktrace's ~\$700M revenue, global customer footprint and 3-peer competitive landscape against CrowdStrike/Palo Alto Networks/Cisco into a 12-page pitch book, channeling findings into final acquisition recommendation for the client

Stanford Continuing Medical Education

Summer Intern

Stanford, CA

June 2026 – August 2026

- Conducted research on business processes, software solutions, and CME certification pathways, comparing options and developing practical recommendations to support operational decision-making
- Analyzed tax and administrative workflows through process mapping and managed transaction data using Excel and Tableau Prep Builder, identifying opportunities to improve efficiency and reporting accuracy

Amity Polis Inc.

Head of Fundraising

San Jose, CA

Jun 2023 – Jun 2025

- Performed financial analysis and revenue tracking across 2 annual campaigns by evaluating donation trends, forecasting program need & presenting recommendations to leadership, supporting strategic planning while expanding opportunities
- Launched the organization's first robotics camp and fundraising initiative by coordinating community outreach, sponsor engagement & event logistics, generating \$20K+ over 2 years while building partnerships that expanded support for future nonprofit programming

Silicon Valley Fencing Center

Receptionist & Assistant Coach

Sunnyvale, CA

Sep 2023 – May 2025

- Maintained financial tracking systems by recording payments, monitoring equipment inventory and reconciling daily cash flow, improving operational organization while providing staff with accurate reporting to support 100+ customer transactions & operations
- Supported athletes, parents and coaches by organizing client records, coordinating scheduling and assisting with instruction across 20+ weekly training sessions, strengthening relationships with customers while improving day-to-day operational efficiency for ~2 years

LEADERSHIP & COMMUNITY DEVELOPMENT

Wellesley College Varsity Fencing Team

NCAA Division III Student-Athlete

Wellesley, MA

Sep 2025 – Present

- Commit 15+ hours weekly to Division III practices, strength training, competition and travel while balancing a rigorous academic schedule, strengthening discipline, resilience and consistent performance against nationally competitive collegiate fencing programs
- Earned Division III First Team All-American and All-Region honors through consistent competitive performance and technical excellence, contributing to the program's national success while reinforcing a commitment to high achievement in athletics/academics

Wellesley Hackathon (WHACK)

Treasury & Sponsorship Team

Wellesley, MA

Apr 2026 – Present

- Researched and contacted approximately 60 prospective sponsors weekly by developing targeted outreach strategies and cultivating corporate partnerships, supporting fundraising efforts while expanding financial backing for a hackathon serving 200+ participants
- Tracked sponsor engagement and negotiated partnership packages ranging from \$2K–\$15K by coordinating communications and managing relationship pipelines, strengthening fundraising efforts while supporting long-term sponsorship growth for the hackathon

Wellesley College Investment Society

Active Member

Wellesley, MA

Sep 2025 – Present

- Completed the AmplifyMe Finance Accelerator and M&A simulation by building financial models, evaluating acquisition scenarios and applying valuation techniques, strengthening technical skills while gaining exposure to 10+ transaction-focused investment analyses
- Participated in 15+ equity research discussions and investment workshops by evaluating market trends, company performance and valuation methodologies, strengthening investment judgment while enhancing my foundation in corporate finance and equity analysis

NON-TECHNICAL SKILLS & INTERESTS

Technical: Python, Excel, Microsoft Word, Financial Modeling | **Certifications:** Mergers and Acquisitions - AmplifyME 2025, Finance Accelerator - AmplifyME 2026 | **Languages:** English (Fluent), Chinese (Fluent), French (Basic)

Emma G. Wood

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EDUCATION

University of California, Davis

Davis, CA

Bachelor of Science in Chemical Engineering

Expected Graduation: May 2029

- **Cumulative GPA:** 3.6/4.0
- **Honors/Awards:** Student-Athlete (Field Hockey), 2025 Fall Dean's List, NFHCA Fall Quarter 2025 Scholar of Distinction
- **Relevant Courses:** AAA in Chemistry, Maths and Psychology A Levels
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 07/2026)

PROFESSIONAL EXPERIENCE

Morgan Stanley

Remote

MAP Investment Banking Fellow

Mar 2026 – Jul 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Chai Discovery — *AI-Driven Drug Discovery Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/75 NCAA athletes (~20%) to compete in a Morgan Stanley case, analyzing Chai Discovery's AI-driven drug discovery platform by evaluating revenue growth assumptions/capital structure/long-term scalability across emerging markets
 - Built 5+ banker-style financial exhibits assessing projected revenue growth, negative EBITDA trends and equity-funded expansion strategy, translating industry benchmarks/public biotech comps into a structured investment thesis for the deal team
 - Identified 4+ key diligence priorities including AI adoption across pharma, EBITDA breakeven timing, monetization strategy and customer expansion assumptions, equipping teammates with a clear framework to guide the team's downstream analysis

Cranbrook School

Kent, United Kingdom

Education Assistant

Apr 2025 – Jul 2025

- Designed and led 5+ weekly physical education lessons for secondary school students, improving students' technical athletic skills, confidence and teamwork through structured instruction and engaging group activities across multiple sports/competitive ability levels
- Managed classes of 20+ students while adapting drills and lesson plans to varying skill levels, strengthening communication, leadership and classroom management skills within an educational athletics environment focused on participation and student development

East Grinstead Sports Club

West Sussex, United Kingdom

Administrative Assistant

Oct 2024 – Feb 2025

- Analyzed membership and sales data to support pricing strategy adjustments, contributing to a 10% increase in gym membership sales and improving overall customer conversion across promotional campaigns/seasonal offerings during peak enrollment/renewal periods
- Supported daily administrative operations by managing scheduling, customer inquiries and membership coordination, helping maintain efficient workflows and positive client experiences across a fast-paced fitness environment serving diverse gym members and visitors

McIndoe Surgical Centre

West Sussex, United Kingdom

Apprentice

Oct 2023 – Oct 2023

- Shadowed 5+ surgical doctors and nurses across patient consultations and procedures, gaining exposure to clinical workflows, patient communication & multidisciplinary collaboration within a high-pressure healthcare setting focused on efficiency/patient-centered care
- Observed pre-operative patient interactions and recovery processes, developing an understanding of compassionate care, emotional reassurance and the importance of trust-building in surgical and medical environments during vulnerable and high-stress experiences

LEADERSHIP & COMMUNITY DEVELOPMENT

University of California, Davis | Personal Finance Club & Field Hockey Team Impact Leadership Group

Davis, CA

Active Member

Mar 2026 – Present

- Participate in 10 weekly seminars focused on market trends/portfolio development/investment strategy to strengthen financial literacy
- Supported a Team Impact teammate facing serious illness by building a consistent relationship through 5+ team activities and interactions, fostering confidence, social development and emotional well-being while strengthening team culture & engagement at UC

University of California, Davis | NCAA Division 1 Field Hockey Team

Davis, CA

Varsity Athlete

Aug 2025 – Present

- Compete at the Division I level while balancing 20+ hours weekly of training, travel and competition alongside a rigorous chemical engineering curriculum, demonstrating discipline, stress management & performance in a competitive academic/athletic environment
- Collaborate with 20+ teammates during practices and high-pressure game situations, strengthening communication, teamwork and on-field execution to improve overall team cohesion and competitive performance throughout the season against top D1 competition

Worth School | Leadership & Community Engagement

West Sussex, United Kingdom

Prefect & Breast Cancer Game Coordinator

Sep 2023 – Jul 2024

- Selected as Sports Prefect, delivering weekly updates during school assemblies and mentoring younger students to strengthen school spirit, athletic engagement and community culture across 500+ students and multiple sports programs throughout the academic year
- Organized a charity field hockey event that raised £2,000+ for Breast Cancer Now, coordinating 10+ student volunteers, managing event logistics and leveraging social media promotion to drive record attendance and successful fundraising outcomes

NON-TECHNICAL SKILLS & INTERESTS

Skills: Teamwork, communication, conflict resolution, problem-solving | **Interests:** Sport, Financial Markets, Chemistry, Puzzle Games, Vegan Baking | **Pre-Professional Programs:** JP Morgan Investment Banking Virtual Experience

Eric von Albertini Mason

Larchmont, NY | eric_von_albertini_mason@brown.edu | Mobile: +1 (914) 349-7926 | [Linkedin Profile](#)

EDUCATION

Brown University

Sc.B. in Design Engineering | Minor in Entrepreneurship

Providence, RI

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0 | **ACT:** 34
- **Honors/Awards:** Eastern Sprints & Ivy League Champion, 2x U23 National Champion, Eagle Scout, Youth National Champion, Recipient of Special Congressional Recognition
- **Certifications/Certificates:** [Wall Street Prep Accounting & Financial Statement Analysis](#), Oliver Wyman First Year Immersion

PROFESSIONAL EXPERIENCE

Marsh McLennan Agency

Corporate Development Intern

White Plains, NY

June 2026 – August 2026

- Supported execution of two insurance agency acquisitions (up to \$15mm purchase price), populating IRR-and NPV-based returns models with sensitivities across terminal multiple, purchase price, WACC, and revenue CAGR, and preparing deal review decks
- Built an end-to-end acquisition model for Corp Dev hiring case study, including a revenue build with retention assumptions, DCF with exit-multiple terminal value, and IRR/NPV returns analysis; presented final recommendation to the Corporate Development team.
- Led development of standardized M&A offer letter templates across all 13 MMA regions, consolidating region-specific formats into a single framework projected to eliminate a full legal review cycle and save ~8 hours of region-specific iterations and drafting per deal
- Presented AI applications in deal execution to Corporate Development and HR leadership, driving adoption of document review, prompt-generation, and general HR workflows.

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – May 2026

- Omada Health | *Digital Chronic Care Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)* | [Pitch Book](#)
 - Built team's financial model for Omada Health, including income statement, balance sheet, and cash flow projections with revenue growth scenarios benchmarked against digital health peers while applying a 12% WACC to strengthen financial visibility
 - Constructed valuation framework testing revenue growth deceleration from 51% to 20% and SG&A leverage from 38% to 25% of revenue, modeling sensitivity across operating assumptions to assess enterprise value impact & strengthen investment analysis
 - Evaluated 3 key risks including payer concentration, regulatory exposure, and digital health competition while proposing 5+ mitigation strategies (i.e., enterprise contracting, multi-condition bundling), strengthening strategic positioning for acquisition

RowAmerica Rye

Varsity Boys Rowing Coach

Rye, NY

Sep 2024 – Sep 2025

- Coached 125+ athletes across Varsity, Novice, and Middle School programs, leading strength training and on-water technical development while helping expand middle school enrollment by 40%, strengthening the long-term competitive pipeline for crew team
- Managed maintenance and safety oversight for 50+ rowing shells, 150+ oars, and 14 launches, optimizing storage systems and performing repairs, resulting in zero serious incidents during tenure

Gericke Group

Intern

Regensdorf, Switzerland

Aug 2024 – Sep 2024

- Completed material processing trials for 3 industrial clients, assembling machines to customer specifications and rigging systems to match factory layouts, contributing to successful customer adoption of Gericke powder processing solutions within complex systems
- Sourced and evaluated 8 new sheet-metal suppliers using AI-assisted research, strengthening Gericke USA's fabrication network and improving manufacturing cost efficiency while ensuring compliance with strict engineering standards across multiple requirements

LEADERSHIP & COMMUNITY DEVELOPMENT

McKinsey & Company

Athlete Leadership Summit Attendee

Silicon Valley, CA

June 2026

- Selected as one of 35 NCAA athletes, participating in McKinsey's inaugural leadership summit, focused on leadership development, problem solving, professional growth, and building connections with McKinsey consultants and peers, culminating in a mock case

Brown Men's Crew

NCAA Division 1 Student-Athlete

Providence, RI

Aug 2025 – Present

- Balance a full academic course load with 25+ weekly training hours across on-water sessions, strength conditioning, and travel, strengthening discipline & time management while maintaining strong academic and athletic performance throughout the crew season
- Develop leadership and teamwork through daily training and competition with 30+ teammates, applying coaching feedback and self-analysis to refine technique, communication, and collective execution during collegiate racing preparation, culminating in an Eastern Sprints and Ivy League Championship.

Boy Scouts of America

Eagle Scout

Larchmont, NY

May 2024 – Present

- Led Eagle Scout service project restoring Monarch butterfly habitat (receiving Special Congressional Recognition) by coordinating with 3+ government and environmental organizations, constructing pollinator planter infrastructure & contributing 150+ personal service hours within a 350+ hour project.
- Served in troop leadership roles including Troop Guide, mentoring 10+ new scouts and tracking advancement progress through structured planning tools, helping achieve 100% advancement to Tenderfoot rank for new members, a troop first

NON-TECHNICAL SKILLS & INTERESTS

Skills: Leadership, communication, coachability | Languages: English (Native), French (Intermediate) Interests: Finance, Welding, Camping

Eshaan Khera

Mobile: +1 (908) 868-6301 | Westfield, NJ | ekhera07@gmail.com | <https://www.linkedin.com/in/eshaankhera/>

EDUCATION

University of Chicago

Bachelor of Arts in Business Economics

Chicago, IL

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis

Emory University

Transferred to University of Chicago after completing 30+ credit hours

Atlanta, GA

Dates Attended: Aug 2025 – Jun 2026

- **Organizations:** Everview Consulting Club, Men's Varsity Tennis
- **Relevant Courses:** Principles of Microeconomics, Principles of Macroeconomics, Calculus, Statistics

PROFESSIONAL EXPERIENCE

Cerity Partners Ventures

Summer Venture Capital Intern

San Francisco, CA

Jul 2026 – Present

- Analyzed a 13,600+ deal PitchBook dataset spanning 5,600+ enterprise AI companies and \$423B invested, sizing 2026 VC funding at \$25.2B (+9.6% YoY) and isolating xAI's \$20B round as ~6.7x the next largest raise, sharpening the firm's read on financing momentum
- Produced a 10-page appendix on regulatory & financing trends by segmenting ~1,900 deals across 4 enterprise AI categories, synthesizing 6 federal & state AI statutes and mapping 700 exits since 2018 (85% acquisitions), supporting diligence on exit pathways
- Reviewed founder pitch decks and mapped 12 leading early-stage enterprise AI funds spanning \$100M–\$100B AUM by focus area and select investments, tracking financing and market news to inform investment theses and support evaluation of prospective opportunities

UBS

MAP Investment Banking Fellow & Team Captain

Remote

Jun 2026 – Present

Selected Transaction Experience

- Celonis — *AI Process Intelligence Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/12 captains from 594 NCAA athletes (top 2.0%) to lead a 5-person deal team through 6 weekly workstreams, presenting Celonis as a European AI-driven SaaS acquisition target for a hypothetical PE client in the U.S. live to UBS bankers
 - Analyzed ~\$407B enterprise AI TAM, ~\$86B European AI SAM and ~\$1.5–3B SOM across 3 high-growth software subsectors using 5+ reputable sources, evaluating enterprise AI adoption, cybersecurity and vertical SaaS trends to shape the valuation thesis
 - Synthesized Celonis' ~\$1.1B ARR, ~\$13B valuation, net revenue retention profile and 3-peer competitive landscape into a 12-page pitch book, applying 20+ hours of Wall Street Prep accounting coursework to strengthen the team's final investment thesis

Trajectory Capital

Summer Private Equity Intern

New York, NY

May 2026 – Jul 2026

- Drove commercial diligence on Legal Decoder, a legal spend analytics portfolio company, sizing a \$3.6B addressable market growing 15% annually and benchmarking 6 core competitors on pricing and product depth to sharpen and de-risk the firm's value-creation plan
- Screened enterprise technology targets against firm criteria, profiling market size, competitive moat, unit economics and exit paths to separate recurring-revenue businesses with pricing power from cyclical ones, presenting findings as weekly investment memos to seniors

First Select

Independent Music Producer/Label Founder

Westfield, NJ

Jan 2022 – Present

- Founded and managed an independent music label representing 5 producers by negotiating licensing agreements, coordinating artist collaborations and overseeing commission-based compensation, expanding commercial opportunities while strengthening partnerships
- Produced original music distributed across 5+ major streaming platforms, contributing to a track that reached #9 on the U.K. Official Singles Charts & surpassed 500K+ global streams, broadening the audience reach while expanding commercial recognition for the label

LEADERSHIP & COMMUNITY DEVELOPMENT

Everview Consulting Club – Emory University

Strategy Analyst

Atlanta, GA

Nov 2025 – May 2026

- Selected as a finalist from 50+ competitors in Everview's strategy case competition by applying SWOT, Porter's Five Forces and market positioning frameworks, strengthening strategic recommendations while working with leadership through structured weekly touchpoints
- Developed a targeted outreach strategy by evaluating 50–100 private equity and venture capital firms, aligning investor mandates and criteria with FundFit's AI-driven deal sourcing platform to strengthen stakeholder targeting and support business development initiatives

U.S. Foreign Policy and Trade Research – Emory University

Independent Researcher

Atlanta, GA

Nov 2025 – May 2026

- Researched the impact of escalating U.S. tariff policy on China by evaluating trade uncertainty, policy credibility and diplomatic signaling, analyzing 100+ market observations and VIX movements to strengthen macroeconomic analysis & evidence-based policy conclusions

Oxford College Men's Varsity Tennis – Emory University

Tennis Player

Atlanta, GA

Aug 2025 – May 2026

- Earned All-Academic First Team honors while competing as the No. 2 singles player on a nationally ranked Top 25 NJCAA Division II team, balancing year-round training, competition and academics while strengthening self-discipline and performance under pressure

SKILLS & INTERESTS

Languages: English, Punjabi (oral)

Skills: Microsoft Excel, Microsoft PowerPoint, Microsoft Word, Google Workspace, RStudio (statistical modeling)

Interests: Music (Production & DJing), Macro-tracking, Golf, Baltimore Ravens, Spontaneous Travel, Chipotle Bowls, March Madness

ETHAN FRIESEL

+1 650-250-6768 | efriese2@jh.edu | www.linkedin.com/in/ethan-friese

EDUCATION

Johns Hopkins University

May 2029

B.A. in Economics | B.S. in Applied Math and Statistics | Minor in Accounting and Financial Management

Baltimore, MD

- **GPA: 4.00 | Dean's List**
- Relevant Coursework: Financial Accounting, Elements of Macroeconomics, Elements of Microeconomics, Discrete Mathematics
- **Johns Hopkins Institute for Applied Economics - Research Assistant, Economic Intelligence Group Co-Chief**
 - Conduct 15+ hours per week of research under Professor Steve Hanke, former Senior Economic Advisor to President Reagan

Saint Andrew's High School

May 2025

Cum Laude Honor Society

Boca Raton, FL

- **GPA: 4.76 | ACT: 35**
- Honors: Head of School List, AP Scholar with Distinction, Sociedad Honoraria Hispánica, Duff Tyler Spirit Award
- Varsity Football: Team Captain, First Team All-County, Academic All-American | Varsity Lacrosse: All-County Honorable Mention

PROFESSIONAL EXPERIENCE

Searchlight Capital Partners

Jun 2026 – Aug 2026

Private Equity Summer Analyst

New York, NY

- Generalist position at leading middle-market private equity firm with \$17B+ AUM focused on North America and Europe
- Screened two M&A opportunities for fiber & industrial portfolio companies, building preliminary DCF and LBO valuation
- Analyzed data books for fiber portfolio company, highlighting changes in operational expenses and management initiatives

Vertical Bridge

Jun 2025 – Aug 2025

Mergers and Acquisitions Summer Analyst

Boca Raton, FL

- Selected for M&A team at largest US private tower company, with over 17,000 towers owned and more than 500,000 sites
- Staffed on two live buy-side M&A tower portfolio transactions, analyzed lease agreements, financials, and tower operational data
- Built weekly financial models for ground lease buyouts (GLBOs) and tower acquisitions, as part of investment decisions

Bank of America x Make A Play Foundation

Dec 2025 – Jun 2026

Investment Banking Fellow, Team Captain

Remote

- Selected as 1 of 50 NCAA athletes nationwide for 20-week investment banking training fellowship sponsored by Bank of America
- Led team of 5 in winning pitch to BofA, outlining valuation and integration strategy for PE-driven healthcare acquisition
- Built company snapshot and investment thesis by modeling tiered pricing and benchmarking against SaaS peers in ASC industry

ACTIVITIES & LEADERSHIP EXPERIENCE

Johns Hopkins University Varsity Football

Aug 2025 – Present

NCAA Division III Athlete, Defensive End

Baltimore, MD

- Member of NCAA Division III National Semifinalist football program, competing in 20+ hours per week of team activities
- Develop effective leadership strategies to motivate teammates through representation in Student-Athlete Advisory Committee

Marshal L. Salant Investment Team

Feb 2026 – Present

Securities Analyst

Baltimore, MD

- Member of student-run investment fund that manages \$500K long-only public equity portfolio for Johns Hopkins scholarship fund
- Present monthly \$10K equity long proposals, producing memos and DCF models that align with undervaluation focus
- Contribute to bi-weekly investment discussions, considering portfolio diversification, sector exposure, and long-term macro strategy

Consortium Equity Research

May 2026 – Present

TMT Analyst

Remote

- Selected to represent TMT group of investment research cohort composed of 100+ members from top US colleges
- Create monthly equity research reports, building DCF models to support valuation thesis in space telecommunications sector

Blue Jays for Baltimore

Aug 2025 – Present

Grant Research Chair

Baltimore, MD

- Volunteer at student-led non-profit organization, providing underserved Baltimore students with mentorship and development
- Write monthly memoranda on local grant opportunities for Baltimore non-profits, targeting \$10K-\$50K annual grant funding

SKILLS, CERTIFICATIONS & INTERESTS

- Skills: Microsoft Office, Java (Intermediate), Spanish (Conversational), Harvard College Data Science, Bloomberg Market Concepts
- Interests: Arsenal Soccer, Biking, Coding, Poker, Hiking, Swimming, Skiing, Professional Lacrosse League, San Francisco Sports

Ethan Guo

1 Baldwin Circle, Shrewsbury, MA, 01545 | jethanguo@gmail.com | (508) 948-7680

EDUCATION

Yale University *B.A. Applied Mathematics* | New Haven, CT **2025 – Present**

- GPA: 3.9/4.0
- Coursework: Multivariable Calculus, Discrete Mathematics, Linear Algebra, Microeconomics, Renewable Energy

Phillips Exeter Academy | Exeter, NH **2021 – 2025**

- GPA: 10.5/11.0; Highest Honors
- SAT: 1560
- Coursework: Financial Math, Differential Equations, Dynamical Systems, BC Calculus, Statistics

WORK EXPERIENCE

Yale Center for Environmental Law and Policy | *Research Assistant* **New Haven, CT | 2026 – Present**

- Conducted research for the 2026 Environmental Performance Index, compiling environmental datasets across 180+ countries and 40+ indicators to build the rankings used by governments, investors, and NGOs.
- Designed and coordinated an AI and sustainability workshop, managing speaker outreach, agenda, and logistics to convene 50+ researchers, policymakers, and industry leaders on emerging applications of AI in environmental policy.

Morgan Stanley x Make a Play Foundation | *Intern* **Remote | 2026 – Present**

- Selected as 1/75 NCAA athletes for an investment banking fellowship, completing a structured M&A and strategic-advisory curriculum with training in accounting and valuation.
- Evaluated a \$58M ARR autonomous-security software target, synthesizing cybersecurity diligence, ~72% gross margins, and 64% YoY ARR growth into a final acquisition thesis presented to Morgan Stanley professionals.

Exeter Student Service Organization | *Swim Instructor* **Exeter, NH | 2022 – 2025**

- Managed aquatic safety and instruction, adapting coaching styles to different skill levels while strengthening leadership and communication skills in a structured learning environment.
- Collaborated with 10+ swim instructors to deliver structured lesson programming, strengthening teamwork, organization and client-service skills while improving student engagement and long-term retention.

EXTRACURRICULARS

Yale University Division 1 Varsity Swimming | *Student-Athlete* **New Haven, CT | 2025 – Present**

- Dedicate 20+ hours per week of practice, competition, and travel to the team.
- Advocate for the team as a representative for the Student Athletic Advisory Council (SAAC) to improve the student-athlete experience

Yale Undergraduate Diversified Investments | *Member* **New Haven, CT | 2025 – Present**

- Engage with 15+ industry professionals and investment leaders to analyze market trends and macroeconomic developments, strengthening communication/networking/investment-analysis skills through exposure to real-world financial discussions/perspectives

Yale Asian Student Athletes Association | *Treasurer* **New Haven, CT | 2025 – Present**

- Manage the organization's annual budget, overseeing financial planning, expense tracking, and reimbursement processes to ensure accurate allocation of funds.
- Maintain detailed financial records and prepare regular reports for leadership.

Camp KESEM | *Camp Counselor* **New Haven, CT | 2026 – Present**

- Led daily programming and served as primary caregiver for a cabin of 8-10 campers ages 6-16, managing conflict resolution, safety protocols, and emotional support in a high-stress, fast-paced environment.

ADDITIONAL INFORMATION

Awards: Scholastic All-American, NISCA All-American, Babcock Award Recipient

Skills: Chinese, Microsoft Suite, JavaScript, HTML/CSS, Canva, Lightroom, Red Cross Lifeguard Certified

Interests: Golf, Gaming, Photography, Poker, Boston Sports, Guitar, Electronic Music, Cooking

Ethan L. Taylor

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EDUCATION

University of Chicago

Bachelor of Arts in Economics and Psychology | Business Specialization

Chicago, IL

Expected Graduation: May 2029

- **GPA:** 3.9/4.0
- **Relevant Coursework:** Investments, Mathematical Methods for Economic Analysis, Financial Accounting at Booth (Fall 2026)

PROFESSIONAL EXPERIENCE

Matson, Inc.

Finance Intern – FP&A, Treasury, & Investor Relations

Walnut Creek, CA

May 2026 – Present

- Evaluated an \$8.2 million equipment-lease buyout through DCF, NPV, and sensitivity analysis, presenting Finance leadership with a recommendation on whether to exercise the buyout or allow the lease to expire.
- Built a dynamic voyage-cost model integrating vessel, tug, barge, fuel, port, and cargo inputs to evaluate the profitability of prospective shipping opportunities across multiple operating scenarios.
- Developed and deployed an AI M&A research agent using Power Automate and Copilot Studio that monitors 20+ news sources daily, identifies and summarizes the five most relevant transportation and logistics transactions, and distributes updates to senior management.
- Built and deployed a Vena BI dashboard adopted department-wide to track key revenue metrics and analyze actual-to-budget and actual-to-forecast variances, supporting recurring performance and planning reviews.

Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Jul 2026

- Selected Transaction Experience: Marvell Technology — AI Infrastructure Semiconductor Platform (Tech M&A / Strategic Advisory Simulation)
 - Selected as one of 75 NCAA student-athletes to lead planning for a five-person strategic advisory case and presented the final investment pitch live to Morgan Stanley professionals
 - Analyzed Marvell's financial profile and developed exhibits highlighting its \$8.2B FY2026 revenue base, 40%+ growth, and data-center exposure to assess AI infrastructure and custom silicon as drivers of scalability, margins, and segment performance.
 - Developed a diligence framework evaluating customer concentration, margin pressure, leverage, and the durability of AI-driven growth to identify key risks and refine the team's investment thesis.

WiseBatch, LLC

Research & Marketing Intern

Lafayette, CA

May 2024 – Aug 2024

- Executed nationwide outreach across 3+ institutional segments, including harm reduction programs, colleges, and sheriff offices, analyzing operating models, fentanyl test-strip adoption, and data practices to identify distribution gaps and growth opportunities.
- Drove partnership development with 15+ community programs and advocacy groups, managing relationships from initial outreach through adoption to expand WiseBatch's fentanyl test-strip distribution network.

LEADERSHIP & ACTIVITIES

University of Chicago Swim Team

Varsity Student-Athlete

Chicago, IL

Sep 2025 – Present

- Train 20+ hours weekly alongside academics, demonstrating discipline, time management and collaboration while competing at a high level and contributing to team success across dual meets/championship events throughout the season against nationally ranked teams
- Achieved 2026 Scholar All-American, 3x UAA Conference Champion, and 4x NCAA DIII National Finalist, reflecting sustained elite performance, competitive consistency and execution under pressure at the national level across multiple championship meets

East Bay Sea Serpents

Volunteer Coach

Walnut Creek, CA

Jun 2024 – Jun 2025

- Coached 15+ athletes with disabilities, designing individualized drills and adapting communication to varying ability levels to promote safety, participation, and skill development across recurring training sessions
- Directed weekly practices for 80+ athletes in coordination with 5+ coaches, allocating staff coverage, structuring activity rotations, and managing on-site logistics to deliver efficient and consistent programming

American Cancer Society (ACS)

Chapter Founder

Moraga, CA

Aug 2023 – Sep 2025

- Founded and scaled a 30+ member American Cancer Society chapter, establishing the leadership structure, recruitment strategy, and operating processes needed to build a sustainable campus organization
- Directed 5+ fundraising and advocacy initiatives, managing event execution, promotion, and Cancer Action Network engagement to mobilize campus participation around cancer awareness and national health-policy priorities

SKILLS & INTERESTS

Technical Skills: Excel, Power Query, PivotTables, XLOOKUP, PowerPoint, Vena, Power Automate, Copilot Studio; basic Python

Programs: Quantum Business, Innovation, and Technology (QUBIT 2026); Private Equity Exploration Program (incoming 2027)

Finance Certification(s): Wall Street Prep Accounting & Financial Statement Analysis

Interests: Piano, philosophy, astronomy, swimming, and tea culture

Gabriel M. McCarthy

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EDUCATION

Columbia University

Bachelor of Science in Applied Math & Financial Economics | Minor in Computer Science

New York, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 3.71/4.0 | **SAT:** 1560
- **Honors/Awards:** NCAA D1 Student-Athlete (Varsity Fencing), Dean's List Spring 2026, Silver Medalist at the 2025 Junior African Championships, 2x All-American, 4x USA Fencing All-Academic First Team, Gold Medal at Division II October NAC
- **Relevant Courses:** Intermediate Macroeconomics, Intermediate Microeconomics, Calculus-Based Statistics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 09/2026))

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow

Remote

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Klarna — *AI-Driven Digital Banking & Global Payments Platform (FinTech M&A / Capital Markets & Strategic Advisory Simulation)*
 - Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Control Phase for a deal team of 5, developing Klarna's investment thesis & deal rationale for a live presentation to UBS Directors: [Andrew Heller](#) | [John Delgado](#) | [Stephen Saville](#)
 - Underwrote the investment case around Klarna's 26-country payments platform, 25% FY2025 revenue growth and AI-driven operating leverage, identifying ~100% implied upside from a ~\$4.6B current EV vs. team's ~\$9.2B blended valuation midpoint
 - Framed the "why now" case around Klarna's post-IPO valuation reset and digital payments growth from \$18.7T to \$33.5T by 2030, pressure-testing BNPL credit losses through phased market expansion, tighter underwriting & diversified funding sources

Tim Morehouse Fencing Club

Fencing Coach

New York, NY

Jun 2022 – Apr 2025

- Coached 20+ elite youth fencers at regional and national competitions, providing technical instruction and real-time strategic feedback while supporting athletes who earned multiple national medals/helping them develop disciplined preparation habits for several seasons
- Mentored 20+ youth athletes through practices and high-pressure competitions, reinforcing sportsmanship, discipline and confidence while adapting coaching to individual development needs and helping athletes build the technical skills/mindset required at elite levels

Ashuraey Law Firm, P.C.

Summer Paralegal Intern

New York, NY

Jun 2024 – Aug 2024

- Researched 5+ emerging regulatory issues across cryptocurrency and bankruptcy, comparing competing legal interpretations and synthesizing findings into concise summaries that helped attorneys evaluate ongoing matters + navigate evolving regulatory landscapes
- Supported 3+ legal workstreams by conducting targeted regulatory research, clarifying attorney expectations and translating complex findings into polished, attorney-ready materials while managing competing priorities and delivering accurate work under tight deadlines

LEADERSHIP & COMMUNITY DEVELOPMENT

International and Division 1 NCAA Fencing | [News](#)

International & NCAA Division I Student-Athlete

New York, NY

Oct 2016 – Present

- Compete at 2 elite levels across international and NCAA Division I fencing, reaching a career-high No. 10 world ranking in the U-20 category while developing the technical precision, preparation & composure required to perform consistently against top competition
- Won 1 U.S. National Championship in 2024 and contributed to a 2026 Ivy League championship team, balancing year-round training, travel and competition while performing in high-pressure individual and team environments against (inter)nationally ranked opponents

Goldman Sachs

2026 Possibilities Series Participant

Remote

Mar 2026 – May 2026

- Selected for the Goldman Sachs Possibilities Series, gaining exposure to core financial services divisions and market dynamics while developing an understanding of risk and capital management through interactive sessions and direct engagement with IB professionals

The Science Survey

Managing Editor

Bronx, NY

Sep 2022 – Jun 2025

- Managed 4 newsroom sections spanning news, sports, arts and editorials, coordinating writers and editors through planning, drafting and publication while strengthening editorial standards and maintaining deadlines across a high-volume student-run digital publication
- Helped drive 2.1x growth in annual site viewership from 270,000 in 2023 to 555,000 in 2025 by improving editorial planning, publishing consistency and content standards while coordinating newsroom operations to increase output and strengthen engagement

Bronx Science Research Program

Social Science Researcher

Bronx, NY

Sep 2022 – Jun 2025

- Conducted 3 years of independent social science research examining the impact of state voter legislation on voter turnout, working with a research mentor to develop methodologies, evaluate policy differences and synthesize findings into a rigorous research project
- Analyzed 1,000+ observations for multiple years using IBM SPSS, applying statistical methods to evaluate relationships between state voting legislation/turnout patterns, translating quantitative findings into research conclusions & becoming a CUNY JSHS Semifinalist

NON-TECHNICAL SKILLS & INTERESTS

Skills: SPSS, Microsoft Excel, Microsoft Word, Public Speaking | **Languages:** Fluent in English and French | **Interests:** Skiing, Traveling, Writing | **Programs:** Python (proficient), C++ (novice)

Gabrielle M. Shepston

Ithaca, NY 14850 | 720-620-0580 | gms285@cornell.edu | www.linkedin.com/in/gabrielle-shepston

EDUCATION

Cornell University, College of Arts and Sciences - Ithaca, NY
Bachelors of Arts in Economics | GPA: 3.98

Aug 2025 - May 2029

PROFESSIONAL EXPERIENCE

AlphaCore Wealth Management - Denver, Colorado

May 2026 - Aug 2026

- Conducted equity research and valuation across three sectors, presenting pitches on Walmart (WMT) and SiTime (SITM)
- Supported the investment team managing \$11B+ in AUM through portfolio analysis, market research and client communications

Citi D1 Athlete Development Program - Virtual

May 2026 - Aug 2026

- Selected to participate in a competitive professional development program focused on finance, leadership and career readiness
- Participated in mentorship, networking and skill-building sessions to strengthen market knowledge and broader industry exposure

Athlete To Athlete Mentorship Program - Virtual

Jul 2026 - Present

- Mentoring young athletes through virtual sessions focused on goal setting, confidence, accountability and athletic development

DMC Global Inc. (Nasdaq: BOOM) - Broomfield, Colorado

Jun 2021 - Nov 2022

- Developed ESG and sustainability reports for three holding companies spanning energy, industrial and building products industries
- Drafted HR training materials and attended HR training following a company acquisition to support workforce transition efforts

EXTRACURRICULAR ACTIVITIES

D1 Track and Field Athlete at Cornell University - Ithaca, New York

Aug 2025 - Present

- Dedicated 20+ hours weekly over two NCAA Division I seasons each year, earning the freshman school record in the 4x400m relay

MAP x UBS - Investment Banking - Virtual

May 2026 - Present

- Selected as 1 of 100 NCAA athletes nationwide (15% acceptance rate from 650+ applicants) for MAP's Money Ball Fellowship -sponsored by UBS, focused on investment banking recruiting, technical preparation, and cross-border private equity strategy
- Advanced to the Playoff Final Round to present a 5-year, valuation-backed investment thesis on a European software company

Consortium Equity Research Program - Virtual

May 2026 - Aug 2026

- Selected to participate in a competitive program focused on financial analysis, valuation and market research for energy investing
- Completed a comprehensive stock pitch on Baker Hughes (BKR), including a DCF, comparable companies analysis, and financial analysis; incorporating insights from a former Product Line Director

Cornell Investment Banking Club - Ithaca, New York

Feb 2026 - Present

- Participated in 10- week rigorous curriculum exposing new members to financial accounting, valuation, behavioral/technical skills
- Completed comprehensive stock pitch on Sea Limited (SE), including full DCF, revenue build and financial analysis; recommended a long investment with 17.7% projected IRR over a five-year horizon

Epsilon Nu Tau - Ithaca, New York

Feb 2026 - Present

- Selected into the nation's first entrepreneurship fraternity, built to inspire and connect the next generation of founders and builders
- Earned runner-up in startup pitch competition presenting a functional product prototype and go-to-market strategy evaluated by VCs

PROJECTS

Self-Hosted LLM Development Environment - Broomfield, Colorado

Jun 2026 - Present

- Conducted market analysis, equity research, and stock pitches using locally hosted AI models without incurring repeated API costs
- Processed and summarized 100+ pages of company filings, earnings transcripts, and market data to accelerate investment research

SilentRoom Startup - Ithaca, New York

Mar 2025 - Present

- Co-founded a startup developing an acoustic device to reduce sound transmission from rooms using active noise cancellation
- Developed consumer device prototype, leading product design, market research and commercialization strategy for SilentRoom

Sunshine Silver Mining (NYSE: SSMR) Research Project - Kellogg, Idaho

Jul 2026 - Present

- Conducted independent research and developed an investment report analyzing Sunshine Silver's operations and growth strategy
- Expected to visit Idaho mine site and engage with mining professionals to understand extraction processes and development plans

ADDITIONAL INFORMATION

Awards/Involvements: Cornell 400 Club, Summa Cum Laude; Seal of Biliteracy; AP Scholar with Distinction (2023–2025)

Skills and Interests: Excel, Valuation Modeling, Entrepreneurship, Snowboarding, Climbing, Painting, Metalworking, Songwriting

Garrett W. Nichols

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EDUCATION

Brown University

Bachelor of Arts in Business Economics

Providence, RI

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0 | **ACT:** 33
- **Relevant Coursework:** Financial Accounting, Principles of Economics, Management of Industrial and Nonprofit Organizations; Intermediate Microeconomics; Intro to Econometrics, Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow

Remote

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Synthesia — *AI-Powered Enterprise Video & Content Generation Platform (Technology M&A / Capital Markets & Strategic Advisory Simulation)*
 - Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Execution Phase for a deal team of 5, building Synthesia's valuation/transaction analysis for a live recommendation to UBS Directors **Andrew Heller** | **John Delgado** | **Stephen Saville**
 - Built a 2024A–2028E financial model forecasting revenue growth from \$58.3M to \$390.0M, benchmarking Docebo's ~80% gross margin / ~18% EBITDA margin and private AI peers to frame Synthesia's path to scale and long-term valuation support
 - Analyzed 3 precedent transactions spanning 16.4x–20.0x EBITDA and 2.8x–4.7x revenue, while assessing execution, regulatory & data-sovereignty risks, designing a 12-page pitch book that translated valuation work into a clear acquisition recommendation

ePAK International, Inc.

Summer Production & Technology Intern

Austin, TX

Jun 2026 – Aug 2026

- Supported production and technology operations across 2+ functional areas at a global semiconductor equipment company, contributing to the design, engineering and manufacturing processes behind precision handling solutions used throughout applications
- Collaborated with 5+ engineering and production team members on technical and manufacturing workflows, gaining hands-on exposure to semiconductor handling systems while supporting execution and developing practical knowledge of equipment production

GTS Technology Solutions

IT Support Technical Intern

Austin, TX

May 2025 – Aug 2025

- Diagnosed and repaired 3+ categories of computer equipment, including desktops, laptops and peripheral hardware, troubleshooting technical issues & restoring system functionality while helping employees maintain reliable access to the technology required each day
- Collaborated with 5+ IT team members on system upgrades, network security and help desk support, documenting technical issues and resolutions in a central knowledge base that improved troubleshooting efficiency & created reusable guidance for recurring issues

The Pool Management Group, Aquatic Management of Austin

Lifeguard

Austin, TX

May 2021 – June 2024

- Supervised swimmers across 2 Austin-area pools over 3 summer seasons, monitoring activity, enforcing facility policies and responding to changing conditions throughout shifts while maintaining a safe, organized and welcoming environment for swimmers and families

LEADERSHIP & COMMUNITY DEVELOPMENT

Brown Finance Club

Member

Providence, RI

Mar 2026 – Present

- Participate in 1 weekly finance education session covering investment banking, asset management and financial markets, building technical knowledge through structured instruction while developing interview skills and a stronger foundation for competitive finance

Brown University Football Team | [News](#)

NCAA Division I Student-Athlete & Defensive Back

Providence, RI

Aug 2025 – Present

- Appeared in 4 games as a true freshman defensive back, earning 1 career start against Cornell and recording 8 total tackles while competing at the NCAA Division I level, demonstrating preparation and adaptability while contributing meaningful snaps during Y1
- Serve on the 2026 Defensive Leadership Council, representing teammates during winter and spring programming while contributing to discussions around accountability, preparation and team standards, helping reinforce communication and leadership on the defense

Young Men's Service League

Treasurer

Cedar Park, TX

Jun 2021 – Aug 2024

- Managed chapter budgeting, expense tracking and financial planning across 3+ years, maintaining organized records and allocating resources across operations/service initiatives while helping leadership coordinate programming and execute community projects well
- Completed 120+ volunteer hours supporting 7 community organizations, including Central Texas Food Bank and Mobile Loaves & Fishes, contributing to food access, housing & community improvement projects while developing a sustained commitment to service

Leander ISD Superintendent Advisory Council

Student Advisor

Cedar Park, TX

Aug 2022 – May 2024

- Selected as 1 of 4 Cedar Park High School representatives to advise district leadership, bringing student perspectives into discussions with the superintendent + school representatives while helping identify priorities and opportunities for improvement across the district

NON-TECHNICAL SKILLS & INTERESTS

Skills: Proficient in Excel; Word; PowerPoint; Accounting & Valuation; Advanced Spanish; Communication

Activities: Brown Athletics Men's Mental Health Club; Brown Christian Union; Theta Alpha Fraternity

Interests: Chicago Bears; Wake Surfing; International Travel; Weightlifting; Star Wars; Poker

Grace J. Ker

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EDUCATION

Stanford University

Bachelor of Science in Economics, Minor in Data Science

Stanford, CA

Expected Graduation: June 2029

- **Cumulative GPA:** 3.95/4.0 | **SAT:** 1520
- **Publications/Awards:** "Before Chemotherapy," Journal of Adolescent Health (Volume 73, Issue 1), President's Volunteer Service Silver Award
- **Finance Certification:** Wall Street Prep Accounting & Financial Statement Analysis

EXPERIENCE

Heroic Ventures

Venture Capital Intern

Palo Alto, CA

Jun 2026 – Present

- Built an agent that scans LinkedIn, GitHub, and patent filings for new Physical AI and robotics startups, then scores founders on an 11-point scale, weighing factors like PhD background, experience at top companies, and repeat founders, to rank deals for the team
- Developed an LP prospecting tool that screens and tiers family-office and high-net-worth targets, verifies leads via trustee-name matching, and auto-drafts personalized outreach emails to move them into the pipeline
- Automated a weekly digest of top new deals and pipeline updates for the team, backed by 250+ tests to keep the scoring reliable

MAP Fellowship - Morgan Stanley

Investment Banking Fellow; Team Captain

Remote

Mar 2026 – Present

- Selected as 1 of 9 captains from 376 NCAA student-athletes nationwide to lead a 5-person deal team in MAP Fellowship's Morgan Stanley Technology Investment Banking case competition, finishing in 1st place
- Valued Alkami Technology using public comps, precedent transactions, and a DCF, implying ~34% upside
- Led industry and company diligence for the deal team, sizing the digital banking market and benchmarking Alkami's competitive positioning against peers to support the team's investment thesis

Charles R. Blyth Fund

Analyst

Stanford, CA

Jan 2026 – Present

- Conducted in-depth stock research and financial analysis for a student-run investment fund with ~\$270K in AUM
- Pitched Accenture to the fund, building a DCF and comparable-companies valuation alongside sector and competitive analysis, leading the fund to allocate 3% of the portfolio to the position
- Pitched buy/hold/sell recommendations in weekly investment committee meetings

LEADERSHIP & EXTRACURRICULARS

Stanford Varsity Fencing

NCAA Division I Student-Athlete; Starter and Anchor

Stanford, CA

Sep 2025 – Present

- Anchored the team at ACC Championships, Western Invitationals, and Schiller Duals, finishing freshman season with the highest power ranking in the Western Region
- Dedicated 20+ hours weekly to a rigorous training schedule and competitions alongside full-time academics
- Gold medalist, Fencing World Cup Cadet Team Event (2023); represented Team USA at Cadet and Junior World Cup competitions

Stanford Athletes in Finance

Analyst

Stanford, CA

Oct 2025 – Present

- Constructed valuation models from 10-K and 10-Q filings across 5+ companies, comparing trading multiples and financial performance to strengthen technical fluency, analytical rigor, and readiness for competitive finance recruiting opportunities
- Engaged in weekly analyst sessions covering financial statement analysis, valuation methods, and current market themes

Nanoseed Foundation

Operations Associate

Remote | Hunan, China

Nov 2024 – Feb 2025

- Interviewed 30+ low-income individuals in Hunan, China to evaluate business experience, growth potential, and repayment readiness, selecting 5 entrepreneurs for \$1K-\$2K microloans to launch small businesses
- Built business plans covering timelines, budgeting, and revenue forecasts, with vendor and pricing research to test whether each venture could service its loan

SKILLS & INTERESTS

Skills/Language(s): Python, C++, Financial Modeling, Mandarin (Fluent)

Interests: Creative Writing, Crochet, Golf, Food and Nutrition

Other Programs/Clubs: Stanford Women in Business, Stanford Women in Finance, Yale Young Global Scholars (2024), Berkeley Business Academy for Youth (2023)

Gracyn W. Lanning

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EDUCATION

University of Notre Dame

Bachelor of Business Administration in Finance

South Bend, IN

Expected Graduation: May 2029

- **Cumulative GPA:** 3.672/4.0 | **ACT:** 31
- **Awards/Accomplishments:** 4x Scholastic All American, Babe Ruth Foundation Award (2025), Steven Todd Gold Award (2023)
- **Relevant Coursework:** Foundations of Finance, Foundations of Accountancy, Principles of Microeconomics, Foundations of Leadership, Foundations of Strategy, Why Business? - The Role of Business in a Just and Humane Society
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 09/2026)
- **Organizations:** Notre Dame Christian Athletes (NDCA), Church of Eleven22

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow

Remote

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#)

- Eye Security — *AI-Powered Cybersecurity, Risk & MDR Platform (Technology M&A / Capital Markets & Strategic Advisory Simulation)*
 - Selected as 1/12 NCAA athletes out of 594 (top 2%) to lead the Monitoring Phase for a deal team of 5, evaluating Eye Security's strategic fit/long-term value creation for live presentation to UBS Directors [Andrew Heller](#) | [John Delgado](#) | [Stephen Savill](#)
 - Developed a 4-part strategic fit and value-creation case around Eye Security's bundled MDR/cyber insurance platform, 15.5% SME cybersecurity market CAGR & NIS2 tailwinds, evaluating geographic expansion and pricing optimization as growth levers
 - Delivered 1 board-level "GO" recommendation, projecting revenue growth from €22.9M in 2024 to €46.9M in 2028 and EBITDA margin expansion from -29% to +8%, while assessing secondary private equity sale and IPO pathways as future exits

Epping Forest Country Club

Summer League Swim Coach

Jacksonville, FL

May 2026 – Aug 2026

- Coached swimmers across 3 competitive age groups spanning ages 6–18, designing structured practices and age-appropriate drills to improve stroke technique, race strategy & overall performance while adapting instruction to individual skill levels/development needs
- Led 10+ competitive swimmers through practices and meet preparation, providing individualized technical feedback and reinforcing proper mechanics while creating a disciplined, supportive training environment that built the confidence required for elite competition

Private Employer

Personal Driver

Jacksonville, FL

Jun 2025 – Aug 2025

- Provided 1 elderly community member with reliable personal transportation throughout the summer, independently coordinating schedules, routes and pickup times to ensure safe/punctual arrival for appointments while adapting plans to changing needs/demands
- Managed 3 core transportation responsibilities spanning scheduling, route planning and timely pickups, anticipating travel needs and adjusting logistics independently while maintaining a dependable, professional and safety-focused experience for an elderly community

LEADERSHIP & COMMUNITY DEVELOPMENT

University of Notre Dame – Varsity Swimming & Diving | [News](#)

South Bend, IN

NCAA Division I Swimmer (Breaststroke/IM/Butterfly)

Aug 2025 – Present

- Compete on the varsity swim team, ranking 6th in Notre Dame program history in the 200 breaststroke (2:12.85) while contributing to the 2026 ACC Championship team and mentoring children facing serious illnesses through the Fighting Irish Fight for Life program

Notre Dame Christian Athletes (NDCA)

South Bend, IN

Member

Aug 2025 – Present

- Participate in 1 weekly faith-based gathering alongside service initiatives, engaging with fellow Notre Dame student-athletes through community-building activities while balancing the time commitments & responsibilities associated with Division I athletics/academics

The Bolles School

Jacksonville, FL

Student Ambassador & Boarding Program Dorm Ambassador & Dorm Tutor

Aug 2021 – May 2025

- Served in 3 student leadership roles spanning campus ambassador, boarding dorm ambassador and tutor, leading tours and shadow days, hosting prospective boarding students and providing weekly physics & English support to help them navigate new surroundings

Bolles Bible Study & Church of Eleven22

Jacksonville, FL

Co-Founder & Member

Aug 2021 – May 2025

- Co-founded 1 student-led Bible study that grew into an established campus ministry serving students across multiple grade levels, helping organize a consistent community for peer engagement while maintaining active involvement in church services and community

The Bolles School Swimming

Jacksonville, FL

Club & Varsity Swimmer & Team Captain

Aug 2021 – May 2025

- Captained 2 competitive swim teams across Bolles club and varsity programs while competing nationally, mentoring younger athletes and strengthening team culture; earned 4x Scholastic All-American recognition and contributed to 4 consecutive Florida State titles

NON-TECHNICAL SKILLS & INTERESTS

Skills: Basic financial statement analysis, time value of money | **Languages:** English (Native), Spanish (Conversational)

Interests: Swimming, faith and community service, mentorship, leadership development, line and swing dancing

Grant M. Schroder

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EDUCATION

Harvard University

Bachelor of Arts in Economics, Secondary in Psychology

Cambridge, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.7/4.0
- **Honors/Awards:** 4 top 10 all-time records for Harvard's track team; Harvard Men's Cross Country & Track Student-Athlete (Top 7 Runner, NCAA Championship Participant)
- **Relevant Coursework (Freshman):** Principles of Economics (Econ 10A/10B) • Introduction to Quantitative Methods for Economics (Stat 104) • Expository Writing (Expos 10/20) • Intermediate Spanish (Spanish 10/11) • Introduction to Psychological Science (PSY 1)
- **Relevant Coursework (Sophomore):** Intermediate Microeconomics (Econ 1010A) • Intermediate Macroeconomics (Econ 1010B) • Psychopathology (PSY 18) • Social Psychology (PSY 15)

London School of Economics

Summer Study Abroad Program

London, United Kingdom

June 2026-August 2026

- Analyzed corporate valuation, capital asset pricing, and market risk models alongside psychological frameworks of consumer decision-making to build data-driven marketing strategies and conduct comparative financial analyses
- Expanded professional knowledge with a Gold Spark Badge
- **Relevant Coursework:** Finance (FM250) • Consumer Behavior for Marketing and Management (MG103)

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow; Team Captain

Remote

Jan 2026 – Present

Selected Transaction Experience

- Omada Health — *Digital Chronic Care Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Led the Control Phase investment thesis on Omada Health, owning 10+ deliverables across 2.5 months while synthesizing healthcare spending trends (\$5.3T U.S. market/18% of GDP) & multi-condition platform strategy to evaluate future investment
 - Built valuation framework comparing Omada's 2.1x LTM revenue multiple against digital health peers trading near 3–4x, analyzing EBITDA expansion from 12.5% to 35% & projecting intrinsic value near \$1B EV, highlighting 50%+ upside potential
 - Identified 4 catalysts including profitability inflection in 2025–2026 and renewed health tech M&A activity while evaluating payer concentration risk and proposing diversification through enterprise contracts, strengthening downside visibility for BofA
 - Received multiple top 5 performer acknowledgements for mock interviews with the most notable consisting of a full technical run

The I.D. Group, Inc.

Architectural Intern

Downers Grove, IL

Jun 2025 – Aug 2025

- Organized and digitized 200+ client files, vendor catalogs, and architectural drawings within the firm's materials library, improving document accessibility and workflow efficiency for project teams managing active design and construction engagements
- Supported administrative finance and procurement tasks by contacting 15+ vendors for pricing and order confirmations while assisting with basic bookkeeping and invoice tracking, strengthening cost visibility + coordination across ongoing architectural projects

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

Harvard Men's XC / T&F

NCAA Division 1 Student-Athlete

Cambridge, MA

Aug 2025 – Present

- Compete as a varsity cross country and track athlete at Harvard while balancing a rigorous Economics curriculum (GPA 3.7), contributing as a top 7 runner as a freshman and competing in all regular season meets and the NCAA National Championship meet
- Manage 25+ hours per week of training, travel, and competition alongside coursework in economics and statistics, translating data-driven performance analysis and race strategy into consistent team contributions and execution in high-pressure environments

Harvard Financial Analysts Club

Member

Cambridge, MA

Aug 2025 – Present

- Participated in an educational club focused on valuation and financial modeling through applied casework and investment analysis
- Built and presented DCF-based valuations, assessed long term growth drivers, and performed a fundamental financial analysis

DGN High School Investment Club

Member

Downers Grove, IL

Sep 2021 – Aug 2025

- Analyzed equity and fixed income markets across 10+ public companies and bond issuers, constructing balanced model portfolios that tracked sector exposure, risk diversification, and weekly return performance to strengthen investment analysis skills
- Monitored portfolio performance and macroeconomic trends through weekly return tracking and market discussions, synthesizing research into structured investment perspectives that improved decision making within the club's simulated portfolio

Christ Church of Oak Brook

Usher

Oak Brook, IL

Jun 2015 – Jun 2025

- Assisted Sunday service operations by supporting the ushering team during weekly services, guiding 100+ attendees to seating, distributing materials, and coordinating offering collection to ensure organized service flow + welcoming environment for congregants
- Provided guest support by assisting elderly attendees with seating and answering general questions while distributing church programs and brochures, strengthening hospitality standards and improving the overall service experience for parish members and visitors

Ukrainian Humanitarian Aid Fundraising Event

Co-Founder

Downers Grove, IL

Mar 2022 – Jun 2022

- Co-founded a community fundraising initiative supporting humanitarian relief for Ukraine, coordinating volunteers, event logistics, and outreach efforts to mobilize local participation and strengthen awareness of international humanitarian needs
- Organized donation drives and community engagement efforts by collaborating with volunteers and local supporters, facilitating fundraising activities that increased contributions and expanded community involvement in humanitarian support initiatives

SKILLS & INTERESTS

- **Financial & Technical Skills:** Financial Modeling, Discounted Cash Flow (DCF) Analysis, Valuation (Comps, LTM Revenue Multiples), Portfolio Risk Management, Financial Statement Analysis
- **Languages & Software:** English (Native), Spanish (Intermediate) | Microsoft Excel (Advanced), PowerPoint, Word
- **Interests:** NCAA Division 1 Distance Running (4x Harvard Track Record Holder), Global Travel (15+ U.S. States, UK, France, Greece), Youth Coaching & Mentorship

Hayden M. Perkins

Tiburon, CA | 650.495.5922 | haydenperkins@berkeley.edu | linkedin.com/in/haydenmperkins

EDUCATION

University of California, Berkeley — Berkeley, CA

Expected May 2029

Bachelor of Science in Data Science, Bachelor of Arts in Economics, Minor in Mathematics

- Honors: **2026 Division I Rugby National Champion** (17-0, undefeated season) | AP Scholar with Honor | SAT: 1490
- Certification: Wall Street Prep — Accounting & Financial Statement Analysis
- Relevant Coursework: Intermediate Microeconomics (Econ 100A), The International Economy of the 20th Century, Structure & Interpretation of Computer Programs (CS 61A), Statistics 20, Calculus II

PROFESSIONAL EXPERIENCE

UBS | Morgan Stanley | Bank of America — Remote

Dec 2025 – Sep 2026

Make-A-Play Investment Banking Fellow — three consecutive cohorts

- **UBS | Summer 2026 | Klarna (FinTech M&A, Capital Markets & Strategic Advisory):** Selected as **1 of 50 NCAA athletes from 594 applicants**, then as 1 of 12 to lead the Monitoring Phase for a 5-person deal team, presenting live to UBS directors
- Framed Klarna's evolution from a balance-sheet lender to a capital-efficient fee-and-servicing network, assessing fit across product, geography, and capabilities against **119M consumers, 1.1M merchants, and \$49B of forward-flow capacity**
- Built a board-level leveraged take-private recommendation at **\$27.00/share and \$6.9B EV**, modeling a 22% FY31E operating margin to generate **~3.0x MOIC and 25% IRR** while stress-testing downside returns and exit pathways
- **Morgan Stanley | Spring 2026:** Completed 20+ hours of behavioral and technical interview preparation, competing against **376 fellows** across 3 Superday-style mock interviews in the Morgan Stanley Skills Challenge
- **Bank of America | Fall 2025:** Simulated an analyst role in the Global Investment Banking division over 10 weeks, delivering 10+ weekly accounting, valuation, and transaction assignments with a **perfect submission record**

OpenAI — Berkeley, CA

Mar 2026 – Present

Campus Ambassador, ChatGPT Lab

- Selected nationally for **Cohort 4** of the ChatGPT Lab, OpenAI's undergraduate research program spanning **70+ campuses**, delivering direct product feedback to OpenAI teams on tools ahead of public release
- Source and document emergent AI use cases through peer-led campus sessions, contributing findings that inform OpenAI education product development
- Lead independent research applying generative AI to scheduling, recovery tracking, and time management for Division I athletes

Next Day Knives — Marin County, CA

Nov 2023 – Present

Founder & Head of Operations

- Founded and scaled a knife-sharpening business, growing **monthly revenue 500% within 12 months** through targeted grassroots marketing and a high-value referral network
- Manage end-to-end operations for **50+ residential and professional clients** with 100% service precision and 24-hour turnaround, generating thousands in annual profit alongside a full Division I athletic schedule

Goldman Sachs — Remote

May 2026 – Jun 2026

Possibilities Series Participant

- Selected nationally for an intensive program on Wall Street fundamentals, personal branding, and investment banking technical skills

LEADERSHIP & ATHLETICS

UC Berkeley Varsity Rugby — Berkeley, CA

Aug 2025 – Present

NCAA Division I Student-Athlete

- Commit **25+ hours per week** to elite training, film review, treatment, travel, and international competition while carrying a full course load; mentor incoming freshman athletes on team culture and standard operating procedures

Next Level Sports — Mill Valley, CA

Dec 2021 – Jan 2025

Flag Football Head Coach

- Directed practice plans and game strategy for 25+ youth athletes across multiple seasons, maintaining a 100% player and parent satisfaction rate

Voyager Outward Bound School — Boundary Waters, MN

Jun 2021 – Jul 2021

Expedition Member

- Completed a 3-week off-the-grid expedition, navigating 100+ miles of remote terrain by topographical map and compass under high-stress conditions

SKILLS & INTERESTS

Valuation & Modeling: Three-Statement Modeling, Financial Statement Analysis, Returns Analysis (MOIC / IRR), Due Diligence

Technical: Excel, Python, R, SQL, C++ | **Languages:** English, Spanish (Conversational)

Interests: Competition, Competitive Athletics, Fishing, Surfing, Guitar, Motorcycles

Henry D. Estes

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EDUCATION

Columbia University in the City of New York – New York, NY

Bachelor of Arts in Financial Economics | ACT: 34

Expected Graduation: May 2029

Cumulative GPA: 3.8/4.0

Awards/Accomplishments: Dean's List (Fall 2025, Spring 2026), NCAA Division I Student-Athlete (Football)

Relevant Coursework: Principles of Economics, Calculus III, Calculus I, Introduction to Statistical Reasoning

Finance Certification(s): Wall Street Prep Accounting & Financial Statement Analysis (completed 09/2026)

PROFESSIONAL EXPERIENCE

Pinecrest Capital Partners

Dallas, TX

Investment Banking & Private Equity Intern

5/2026 – 7/2026

- Supported 3+ active M&A engagements across buy-side and sell-side transactions by participating in client meetings, evaluating strategic opportunities & coordinating deal workstreams, providing analytical support that helped senior bankers advance transactions
- Built 3-statement financial models and company analyses in Microsoft Excel for prospective clients, evaluating operating performance, growth assumptions and transaction considerations to provide senior team members with reliable inputs for deal evaluation/discussions
- Developed pitch books and acquisition rationale materials across 2+ transaction types, translating financial analysis, market research & strategic considerations into client-facing presentations that communicated deal opportunities and supported target company outreach

UBS

Remote

Make A Play Investment Banking Fellow

6/2026 – 9/2026

Selected Transaction Experience

- Eye Security – *AI-Powered Cybersecurity, Risk & MDR Platform (Technology M&A / Capital Markets & Strategic Advisory Simulation)*
 - Selected as 1/12 NCAA athletes out of 594 (top 2.0%) to lead the Planning Phase for a deal team of 5, building Eye Security's financial summary and operating KPI analysis for a final recommendation to UBS Directors: Andrew Heller & John Delgado
 - Evaluated Eye Security's €6.6M FY2024 EBITDA loss, 45–49% modeled gross margins and debt-free capital structure alongside 4 cybersecurity market trends, assessing profitability, liquidity and regulatory tailwinds to establish team's investment framework
 - Co-designed a 12-page pitch book analyzing 15.5% SME cybersecurity growth, €10M NIS2 noncompliance fines and 10–20% cyber insurance penetration, applying 20+ hours of Wall Street Prep accounting coursework to support final recommendations

St. Mark's School of Texas

Dallas, TX

Development & Alumni Relations Intern

6/2025 – 8/2025

- Conducted personalized outreach to 100+ alumni and prospective donors while managing record updates, marketing initiatives and development projects, improving alumni engagement & supporting fundraising efforts across the school's broader advancement program
- Helped increase annual fund participation from 56% to 60% and dollars raised from \$6.2M to \$7.1M between FY2024 and FY2025 through donor outreach/alumni engagement initiatives, contributing to a nation-leading 60% annual fund participation rate

EXTRACURRICULARS

Columbia University Varsity Football

New York, NY

NCAA Division I Student-Athlete

8/2025 – Present

- Dedicate 40+ hours weekly to NCAA Division I football through practices, strength training, film study, competition and team meetings while balancing Ivy-League coursework, developing adaptability, discipline & time management skills under intense pressure
- Compete on Columbia's offensive line, preparing through film analysis, position-specific training and team practices while adapting to multiple responsibilities and contributing versatility, accountability, and depth to the team

Columbia Alpha Partners

New York, NY

Director at Investment Banking Division

9/2025 – Present

- Selected through a <10% acceptance rate to join the Investment Banking Division, participating in financial education workshops, market research, firm visits and technical training focused on developing practical knowledge of M&A, valuation and capital markets
- Construct financial analyses across 4 core valuation methodologies, including a 3-statement model, 10-year DCF, precedent transactions, comparable companies and LBO analysis, developing end-to-end technical proficiency through a retrospective M&A case study

Student Government, St. Mark's School of Texas

Dallas, TX

Senior Class President

8/2024 – 5/2025

- Elected by 101 classmates; wrote and delivered speeches to the student body, Board of Trustees, and alumni, including a Commencement address before 1,000+ attendees, building consensus and representing the senior class
- Led weekly Student Council meetings by delegating responsibilities, communicating student priorities to administrators and organizing class initiatives, including an auction that raised \$160,000+, translating student leadership into meaningful support for the broader school community

NON-TECHNICAL SKILLS & INTERESTS

Skills: Public Speaking, Problem Solving, Project Management, Microsoft Office, Leadership, Organization

Languages: Conversational Spanish

Interests: Journalistic Writing, Grilling, Country Music, Sports Card Collecting, Bible Study, Coaching

Programs: Training the Street Certification for Excel and Financial Modeling

Ia Q. Reistad

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EDUCATION

Johns Hopkins University

Bachelor of Science in Biomedical Engineering

Baltimore, MD

Expected Graduation: May 2029

- **Cumulative GPA:** 3.53/4.0 | **ACT:** 35
- **Honors/Awards:** Varsity Cross Country & Track + Field Athlete, Admitted to competitive Biomedical Engineering program
- **Relevant Courses:** Linear Algebra, Design Cornerstone, Gateway Computing: Python
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 07/2026)

PROFESSIONAL EXPERIENCE

Wildbait Devices LLC

Team Leader

Fort Collins, CO

May 2024 – Present

- Formed an LLC and developed a wildlife device dispensing rabies-vaccine bait to raccoons, collaborating with 2+ government agencies to test product performance across Indiana and Pennsylvania through field trials and trail-camera data collection initiatives
- Partner with government stakeholders and wildlife-testing teams to evaluate bait-dispensing device effectiveness, collecting operational data through trail-camera monitoring while supporting future commercialization efforts & maintaining relationships with future buyers

Propedix LLC (Biopharma + Consumer Health)

Loveland, CO

Product Formulation Intern

May 2026 – August 2026

- Formulated cosmetic prototypes for use in clinical trials by optimizing ingredient ratios for stability/texture and safety, strengthening laboratory technique and data-analysis skills while contributing to quality-focused product-development
- Maintained meticulous laboratory notebooks documenting chemical compositions and batch results, strengthening regulatory compliance, teamwork and safety-management

Dog Services

Fort Collins, CO

Self-Employed Trainer (Seasonal)

Apr 2020 – Present

- Provided training, grooming, and behavioral support services for 15+ neighborhood dogs, strengthening communication, adaptability and client-service skills while tailoring care approaches to different breeds/temperaments, and care for stretches of up to 2+ months

Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Jul 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#)

- Stripe — *Global Payments & Financial Infrastructure Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1 of 75 NCAA athletes (~20%) to lead the Control Phase for a 5-person deal team, recommending Stripe as a potential acquisition for a simulated PE client while refining and delivering a final presentation live to MS bankers on 6/8/2026
 - Evaluated 2 major fintech growth drivers supporting Stripe's long-term positioning, analyzing ~\$1.9T in 2025 payment volume (+34% YoY), 5M+ platform businesses & expansion into higher-margin services including billing, tax + financial infrastructure
 - Assessed 3 enterprise competition and pricing-pressure risks across the payments landscape, evaluating Stripe's platform integration depth/merchant-retention dynamics/bundled-service strategy while developing ~5 mitigants tied to switching costs

Dartmouth Joint Science Education Project

Hanover, NH

Research Assistant

Jun 2025 – Jul 2025

- Collaborated with graduate students across biology and Arctic-science disciplines during a 6-week Dartmouth research program, strengthening laboratory and field-research skills while contributing to ongoing environmental and ecological research initiatives
- Researched arthropod abundance across multiple moss species through hands-on ecological fieldwork, collecting observational data and supporting graduate-level projects focused on environmental analysis, biological systems, and Arctic ecosystem research methods

LEADERSHIP & COMMUNITY DEVELOPMENT

Plast USA Ukrainian Scouting Organization

Scout, Scout Leader

Buffalo, NY

Feb 2014 – Present

- Completed a solo 72-hour wilderness survival assessment while progressing toward the Eagle Scout Award, strengthening resilience, leadership & outdoor problem-solving skills through long-term participation in Ukrainian scouting + cultural-development programs
- Planned and led large-scale scouting events including a camp Olympiad for 60 participants and cultural-history programming for 80 scouts, strengthening organizational leadership, event-management and communication skills within multilingual team environments

Run Your City

Volunteer Coach

Baltimore, MD

March 2026 – Present

- Coaching 60+ elementary students using organized running games to build positive mentality around running, demonstrating active leadership, encouragement, and planning during weekly community fitness sessions

Civil Air Patrol (Junior Civilian Auxiliary of U.S. Air Force)

Cadet Leader

Fort Collins, CO

May 2021 – May 2025

- Advanced through 10 cadet ranks to the Chief Master Sergeant leadership position, supporting search-and-rescue missions and volunteering at major aviation events including USAFA graduation ceremonies and Wings of Wyoming community outreach initiatives
- Served as a Mission Radio Operator supporting search-and-rescue responses for lost hikers, medical transport and downed aircraft scenarios, strengthening communication, emergency-response/operational-coordination skills within high-pressure field environments

NON-TECHNICAL SKILLS & INTERESTS

Language(s): Spanish, Ukrainian | **Programs:** Microsoft Excel, Python | **Interests:** Skiing, trail running, environmental protection, travel

Isaac J. Ly

832-441-7747 | ily@mail.wlu.edu | <https://www.linkedin.com/in/isaac-ly>

EDUCATION

Washington and Lee University – Lexington, VA

Bachelor of Science in Accounting and Cognitive and Behavioral Science

Expected Graduation: May 2029

Cumulative GPA: 3.9/4.0

Awards/Accomplishments: W&L Scholar Athlete (2025-2026)

Relevant Coursework: Accounting 100, Intro to Macroeconomics, Intro to Microeconomics, Cognition, Brain and Behavior

Organizations: Varsity Baseball Team, Outing Club, Pickleball Club

PROFESSIONAL EXPERIENCE

UBS

Remote

MAP Investment Banking Summer Fellowship & Team Captain

06/2026 – Present

- Selected as 1 of 12 team captains from 594 NCAA student-athletes (top 2%) to lead a five-person investment banking team through a six-week live M&A advisory simulation to a perspective private equity firm to be presented to UBS investment bankers
- Built a bottom-up investment thesis for Quantexa, evaluating its AI-driven entity resolution platform across financial crime, customer intelligence, and enterprise AI markets while taking to account value adds such as expanding to new markets and regions
- Directed the development of a 12-page investment pitch book synthesizing market research, competitive positioning, financial analysis, valuation outputs, and key investment risks into a recommendation for a hypothetical private equity client
- Built an integrated valuation model for Quantexa incorporating historical financial statement analysis, operating projections, public comparable companies, precedent transactions, a discounted cash flow analysis, and football field valuation to assess acquisition value

The Dinerstein Companies

Houston, TX

Real Estate Development Intern

01/2025 – 02/2025

- Developed comprehensive decks analyzing prospective collegiate markets (JMU and Indiana) and presented to senior management
- Conducted detailed on-site property inspections at Texas State University of current properties and prospective prosperities
- Performed competitive benchmarking of rival developments to assess market positioning, amenity trends, and layout efficiencies
- Analyzed the differences in revenue and ROI between traditional multi-family branch of the company to the student housing side

SCF Partners

Houston, TX

Private Equity Summer Shadow

06/2024 – 07/2024

- Assisted in the synthesis of an investment memorandum (IM) and constructed a strategic market map to visually segment industry competitors and used metrics in competitors 10-K to help understand market trends as a whole and potential company's niche
- Researched potential acquisition targets and macro industry trends using AI to support senior leadership with market analysis
- Shadowed the Chief Executive Officer and President of a key portfolio holding company to gain high-level operational exposure regarding corporate executive decision-making and strategic corporate planning as well as supply chain logistics
- Streamlined outreach by integrating AI tools to help optimize deal sourcing and accelerate initial engagement with potential clients

EXTRACURRICULARS

Washington and Lee Varsity Baseball

Lexington, VA

Student-Athlete

08/2025 – Present

- Leverage data-driven pitching metrics to optimize individual performance and design specialized improvement and approaches to teams
- Manage a demanding 30+ hour weekly commitment of rigorous practice and game schedules in the most competitive conference
- Cultivate advanced discipline, personal accountability, and split-second decision-making under high-pressure competitive scenarios to positively contribute to a collaborative, success-driven team culture

Student Investment Management Committee

Houston, TX

Founding Director

12/2024 – 05/2025

- Led a specialized team of 5 student research analysts to systematically discover, evaluate, and pitch Real Estate Investment Trusts (REITs) based on dividend yield, macroeconomic tail winds, and underlying asset quality to an investment board bi-monthly
- Presented data-driven investment thesis to the general body on major player in industrials and provided a 20% return on investment
- Co-managed a \$100,000 allocation of the endowment portfolio, prioritizing long-term capital appreciation and risk mitigation through highly disciplined and diversified equity selection strategy across multiple sectors including real estate

PROGRAMS & INTERESTS

Programs: Microsoft Excel, Microsoft PowerPoint, Mac OS, Canva, WSP Accounting

Interests: Running, Pitch Design and Biomechanics, Ice Cream, Rick Riordan

Joachim R. Johnson

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EDUCATION

Harvard University

Bachelor of Arts in Economics

Cambridge, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.48/4.00 | **SAT:** 1340
- **Relevant Coursework:** Calculus II, Macro & Microeconomics, Wall Street Prep Accounting & Financial Statement Analysis
- **Organizations:** Harvard Men's Track & Field, Harvard Financial Analyst Club, Harvard Black Men's Forum

PROFESSIONAL EXPERIENCE

Harvard Business School

Research Assistant

Cambridge, MA

Jun 2026 – Aug 2026

- Conducted empirical research under Professor Andrei Shleifer analyzing the wage growth gap between safety and non-safety municipal employees, leveraging ChatGPT and the GABRIEL library to source and validate research leads.
- Gained hands-on exposure to labor economics research methodology and terminology, while developing efficient AI-assisted workflows to accelerate literature review and data analysis.

Bank of America

MAP Investment Banking Fellow; Team Captain

Remote

Jan 2026 – May 2026

Selected Transaction Experience | [Pitch Book](#)

- Komodo Health — *Healthcare Data & Analytics Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Lead the Initiation Phase as 1/15 captains (~2%) from 654 fellows, directing a 5-person deal team through ~5 research sprints/week to recommend Komodo Health as a strategic acquisition, culminating in a final presentation to BoFA on 3/23/26
 - Built Industry Snapshot sizing Global Healthcare TAM at ~\$11.0T (2024), U.S. SAM at ~\$3.56T, and U.S. Healthcare Analytics SOM at ~\$21.2B, prioritizing high-growth subsectors (Wearables ~20% CAGR, Retail Clinics ~\$12.5B) to anchor relevance.
 - Developed a Company Snapshot modeling ~\$285M 2024 revenue, ~30% YoY growth, and margin expansion (68%→72%), benchmarking Veeva, Definitive Healthcare & HealthVerity while evaluating ~5 integration risks to strengthen recommendation.

The Harvard Shop

Sales Associate

Cambridge, MA

Jun 2026 - Present

- Delivered a premium shopping experience for customers, going above and beyond to meet their needs and build repeat business.
- Trusted with cash-handling responsibilities, including counting registers at opening and closing, performing change runs to keep transactions running smoothly, and depositing checks to close out the store each night.

Harvard Summer School

Secondary School Proctor

Cambridge, MA

Jun 2026 – Aug 2026

- Mentor and supervise a cohort of high school summer students, facilitating their transition to a rigorous collegiate environment through academic guidance and community programming.

LEADERSHIP & COMMUNITY DEVELOPMENT

Harvard Men's Track & Field

NCAA Division 1 Student-Athlete; High Jumper & Triple Jumper

Cambridge, MA

Sep 2025 – Present

- Secured 3x Ivy League (HEPs) podium finishes, highlighted by an Outdoor Triple Jump Championship (1st) alongside 2nd (Indoor) and 3rd (Outdoor) place finishes in High Jump.
- Rank #5 on Harvard's all-time list for both Indoor High Jump and Outdoor Triple Jump, balancing 20+ weekly training hours with academics to drive elite performance consistency.

Harvard Black Men's Forum

Member

Cambridge, MA

Sep 2025 – Present

- Mentor middle-school boys through the David Walker Scholars program by leading discussions on identity, confidence, and belonging across 10+ sessions, improving youth engagement and supporting consistent personal-development outcomes

Independent Study on Track & Field Biomechanics

Researcher & Content Creator

Newtown Square, PA

Sep 2024 – Present

- Conduct an independent biomechanics study by analyzing elite-coaching texts and lectures, translating technical concepts into applied training insights that strengthen athlete understanding, technique efficiency, and long-term performance execution
- Create educational video content for jumpers of all levels and provide individualized feedback to 50+ athletes via social media, improving technical clarity, injury-prevention awareness, and measurable gains in jump mechanics across users

Episcopal Academy Varsity Track & Field

Captain; High Jumper & Triple Jumper

Newtown Square, PA

Mar 2022 – Jun 2025

- Served as senior-year captain leading 30+ athletes through practices, meet preparation, and feedback sessions, strengthening team cohesion, competitive focus, and the overall reliability of a high-performing varsity track & field program
- Achieved elite competitive success with 3 All-American honors, 2 state championships, 6 conference titles, and county records while contributing across four seasons, elevating program visibility and sustaining high collective performance standards

SKILLS, PROGRAMS, & INTERESTS

Skills: Microsoft Excel, Microsoft Word, Google Workspace, English (Primary), Spanish (Intermediate)

Interests: Stock & Options Trading; AI/Technology; Mentorship/Youth Development; Formula 1; NFL; NBA; Track & Field

Programs: 2026 Goldman Sachs Possibilities Series, 2026 Guggenheim Freshman Day on the Job

John Dale

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EDUCATION

Carnegie Mellon University – Tepper School of Business

Pittsburgh, PA

B.S. Business Administration | NCAA Student-Athlete | Cumulative GPA: 4.0/4.0

May 2029

Relevant Coursework: Finance, Accounting, Business Computing, Microeconomics, Macroeconomics, Calculus 1-3, Business Science, Statistics

Finance Certifications: Wall Street Prep Accounting & Financial Statement Analysis

RELEVANT EXPERIENCE

Watercress Capital

Remote

Investment Banking Summer Analyst

June 2026 – July 2026

- Constructed financial summaries (Profit & Loss and Balance Sheet) for target companies using corporate tax returns to assess financial health.
- Developed dynamic financial dashboards to compare future growth rates, valuation structures, and debt service coverage for potential acquisitions.
- Built a comprehensive Confidential Information Memorandum with company analysis, executive summary, industry outlook, and financial models.

Aegis Project Controls

Silver Spring, MD

Finance Intern

May 2026 - August 2026

- Analyzed an acquisition target's CIM and financial statements, evaluating financial performance and risks to develop targeted due diligence questions.
- Maintained project documentation, financial records, and tracking spreadsheets to support accurate and timely execution across client engagements.
- Collaborated with project teams to coordinate workflows, prepare client deliverables, and support daily operations across multiple engagements.

Make a Play Foundation

Remote

Investment Banking Fellow

March 2026 – Present

- Selected as 1 of 75 athletes to lead a 5 member deal team, delivering company research, financial modeling, & a final investment recommendation.
- Evaluated key investment drivers, analyzing recurring SaaS revenue, EBITDA expansion, & cloud-banking trends to assess Alkami's positioning.
- Assessed long-term growth, profitability, & balance-sheet risk, supporting a "Go" investment recommendation based on scalable SaaS economics.

Investment Banking Virtual Programs on Forage (Citibank, Bank of America, JPMorgan Chase)

Remote

Virtual Analyst

January 2026

- Identified ideal acquisition targets for clients using SWOT analyses; constructed DCF models to calculate implied equity and share values.
- Developed 5-year financial projections in Excel, drafted comparative company analyses, & created internal summary reports for investors.
- Adjusted DCF models to account for a competitor bid & supply chain interruption, & created a client memo with summary of auction processes.

Financial Analyst Student Training (FAST)

Pittsburgh, PA

Financial Student Analyst

September 2025 – Present

- Educational program exposing students to real-world financial experience through building investment pitches, and valuation models.
- Conducted research, built DCF and Comps models as well as a pitch deck longing the investment in NVIDIA in the Tech Industry.
- Built paper LBO models financed with both debt and equity for numerous companies, and calculated IRRs and MOICs.

NCAA ATHLETICS

Carnegie Mellon Varsity Football

Pittsburgh, PA

Outside Linebacker

August 2025 – Present

- Committed over 40 hours per week to intense training schedules, film study, travel, while balancing athletics with a full academic course load.
- Engaged in rigorous weightlifting and conditioning sessions to maintain peak physical performance required for competitive collegiate play.
- Applied coaching feedback through film study and practice adjustments, improving technique, decision-making, and individual performance.

LEADERSHIP

Alpha Sigma Phi Fraternity

Pittsburgh, PA

Member

September 2025 – Present

- Coordinated with 100+ fraternity members to plan and execute large-scale social events, enhancing community engagement.
- Participated in chapter meetings and recruitment initiatives to drive membership growth and strengthen the brotherhood between current members.

Bethesda-Chevy Chase High School Football Captain

Bethesda, MD

Football Captain

May 2024 – December 2024

- Captained the BCC high school football team and led the team to its first ever 8-win season and first quarterfinal playoff appearance in over 25 years
- Led the team in tackles, turnovers, receiving yards, and receptions, earning All-Conference & All-Division honors, and bowl invites.

Light House Pools

Chevy Chase, MD

Lifeguard

May 2023 – August 2025

- Worked 15-20 hours per week during summers by ensuring swimmer safety and pool maintenance while also communicating with pool members.
- Learned CPR and first aid certification, as well as real-world skills such as communication, organization, conflict management, & attention to detail.

INTERESTS & VOLUNTEERING

Interests: New England Patriots, Tottenham, World Cup, March Madness, SCUBA, Golf, Weightlifting, Skiing, UFC, Game of Thrones

Volunteerism: Provided 250+ hours of service to the elderly/homeless/underserved over the last 5 years

Jolyn Ding

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EDUCATION

New York University | Leonard N. Stern School of Business

Bachelor of Science in Finance & Computing and Data Science | Minor in Mathematics & Computer Science

New York, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 3.9/4.0
- **Relevant Courses:** Principles of Financial Accounting, Statistical Business Control & Regression Forecasting Models, Linear Algebra, Microeconomics with Calculus, Intro to Computer Science. Wall Street Prep Accounting & Financial Statement Analysis

PROFESSIONAL EXPERIENCE

Will-V (Athletic Apparel Brand)

Brand & Marketing Strategist

Remote

May 2026 – Present

- Identified and enhanced brand identity and foundation to better attract targeted audiences, conducting competitor market research across growth strategies, content, and social positioning to inform brand direction
- Optimized website visual and content elements while managing Klaviyo email flows, ensuring customers who clicked on products were flagged and served follow-up emails to drive conversion
- Drafted and iterated product copy for a five-piece shorts and shirts line, translating research insights into plain, benefit-forward messaging aligned with brand voice
- Measured campaign performance through social media and ROI analytics, translating insights into content strategy adjustments that increased post engagement by over 20%

UBS

MAP Investment Banking Fellow

Remote

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Quantexa — AI-Powered Decision Intelligence & Analytics Platform (Technology M&A / Capital Markets & Strategic Advisory Simulation)
 - Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Control Phase for a deal team of 5, developing Quantexa's investment thesis & deal rationale for a live presentation to UBS Directors: [Andrew Heller](#) | [John Delgado](#) | [Stephen Saville](#)
 - Identified 3 near-term catalysts across enterprise AI adoption, cloud-native product delivery and Microsoft Fabric distribution, assessing how Quantexa could expand beyond Tier-1 banking into insurance, government, healthcare & mid-market customers
 - Evaluated ~5 key competitive risk from hyperscaler bundling and assessed Quantexa's regulator-tested compliance IP, Microsoft co-engineering and embedded enterprise integrations as mitigants supporting long-term differentiation and customer retention

Fever AAU Inc.

Basketball Coach & Social Media Manager

Burlingame, CA

Jun 2023 – Aug 2025

- Coached 30+ youth basketball athletes per season, designing and leading 2–3 team training sessions weekly across ~6–9 hours focused on ball handling, shooting and passing while adapting instruction to individual development needs + building consistent fundamentals
- Produced 40+ social graphics and videos using Canva and CapCut while managing Fever AAU's Instagram content strategy for 2+ years, maintaining a consistent visual identity and posting cadence that contributed to 200+ follower growth & multiplied engagement
- Managed 2 roles across basketball coaching and social media, translating on-court programming into digital content while coordinating weekly training and publishing branded graphics and videos that strengthened athlete engagement, team visibility/community presence

LEADERSHIP & COMMUNITY DEVELOPMENT

New York University | Varsity Women's Basketball

NCAA Division III Student-Athlete

New York, NY

Sep 2025 – Present

- Compete as an NCAA Division III basketball student-athlete while pursuing rigorous coursework in Finance, Computing and Data Science, committing 25+ hours weekly to practices, strength training, film study & competition while balancing a demanding schedule
- Contributed to an NYU women's basketball program that extended its historic winning streak to 91 games and finished the season 30–1, competing in a high-performance environment while developing discipline, preparation & resilience through year-round training

Violet Leadership Academy

Student-Athlete Leadership Fellow

New York, NY

Sep 2025 – Present

- Selected for a competitive student-athlete leadership fellowship focused on mentorship, personal development and community building, participating in structured programming designed to strengthen communication, leadership, and engagement across campus
- Collaborate with a cohort of ~30 student-athlete fellows on initiatives designed to strengthen peer support and campus engagement, applying leadership frameworks through group programming, mentorship + discussions while building relationships throughout NYU

Pinewood School - The Perennial | [News](#)

Editor-in-Chief

Los Altos Hills, CA

May 2024 – Jun 2025

- Led a 50+ member editorial team of writers, editors and photographers to produce 6 monthly print and digital publications, managing weekly editorial meetings and coordinating deadlines across 4+ content teams while maintaining quality and consistency in each issue
- Oversaw end-to-end production of 30–40 articles per issue from drafting through final publication, designing print and digital layouts in Adobe InDesign and coordinating editorial workflows that delivered polished publications to a readership community of 1,000+

NON-TECHNICAL SKILLS & INTERESTS

Skills: Mobile App Development (Lua), Python, Java, Google Colab, Microsoft Office Suite, Adobe Creative Suite, Canva, CapCut

Interests: Basketball, graphic design, brand strategy, health and wellness, collecting vinyl records

Julia Lewkowitz

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EDUCATION

University of Chicago

Bachelor of Arts in Economics & Political Science

Chicago, IL

Expected Graduation: May 2029

- **Cumulative GPA:** 3.9/4.0
- **Honors & Awards:** NCAA Division III Student-Athlete (University of Chicago Women's Varsity Volleyball)
- **Organizations:** Restructuring Finance Program, Women in Economics, Business for Latino Development Finance Track
- **Board member:** Smart Woman Securities

PROFESSIONAL EXPERIENCE

Tauá Partners

Restructuring Investment Banking Intern

São Paulo, Brazil

Jul 2026 – Aug 2026

- Supported a distressed agribusiness restructuring by analyzing the company's valuation decline since its IPO and building a personnel cost optimization model that identified approximately R\$50 million in potential annual savings
- Contributed to a sell-side distressed M&A pitch for the heavy-components division of an automotive parts manufacturer by developing buyer profiling materials, analyzing customer relationships and revenue by client, and building EBITDA, EBITDA less CapEx, and liquidity projections to position the division for acquisition
- Structured a debt reorganization analysis for a home goods manufacturer by classifying ~R\$800 million in creditor claims into statutory priority tiers (labor, unsecured, and small business) and mapping secured bank exposure and collateral by creditor class
- Authored and presented a firm-wide training deck on Brazil's judicial and extrajudicial restructuring framework, modeling the post-pandemic surge in restructuring filings and incorporating iterative feedback from senior professionals: [Restructuring in Brazil](#)

Bank of America

MAP Investment Banking Fellow; Team Captain

Remote

Jan 2026 – May 2026

[Selected Transaction Experience](#) | [Pitch Book](#)

- Omada Health — *Digital Chronic Care Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
- Led the Initiation Phase as 1/15 captains (~2%) from 654 fellows, directing a 5-person deal team through ~5 research sprints/week to recommend Omada Health as a strategic acquisition, culminating in a final presentation to BoFA on 3/23/26
- Built an Industry Snapshot modeling Global Healthcare TAM at ~\$11.0T (2024) and estimating Omada's U.S. TAM at ~\$37.8B based on 130M clinically eligible insured lives at ~\$290/member, narrowing to a ~\$5.6B SAM across self-insured populations
- Formulated a company profile projecting ~\$257M FY2025 revenue across 886K members and modeling pathway to ~\$650–700M revenue at 12% penetration, positioning Omada against industry peers such as Hinge Health, Virta, and Teladoc

SheSpeaks! (Non-Profit Organization) | [Website](#)

Co-founder & Manager

Remote

June 2020 – Aug 2025

- Co-founded a bilingual education platform connecting 2,000+ Brazilian girls with English-speaking mentors by evaluating capacity models across 3+ segments and optimizing student-teacher ratios, strengthening operational structure and enabling scalable growth
- Developed a 3-part business plan outlining financial needs, target demographics, and student-teacher ratios while assessing operational capacity across 2,000+ learners, strengthening the program's scalability and long-term viability for continued expansion
- Built a bilingual website and led outreach through 2+ partner channels by analyzing engagement from early cohorts and refining messaging across 40+ posts, improving awareness, participation & visibility during the program's initial expansion phase

LEADERSHIP & PROFESSIONAL DEVELOPMENT

University of Chicago Varsity Volleyball Team

Student-Athlete

Chicago, IL

September 2025 - Present

- Compete on an NCAA Division III roster by balancing 20+ weekly training hours, weekend matches, and full academic coursework while aligning with team strategy across multi-phase practice cycles, strengthening discipline & comfort in high-pressure environments

Ransom Everglades School (High School)

Miami, FL

August 2021 – May 2025

- *Honors Society:* Mu Alpha Theta, Science and Spanish
- *Student Ambassador:* Represented the senior class by speaking on panels for 100+ families and leading 30+ campus tours during admissions events, synthesizing academic and student-life insights to strengthen prospective-family engagement and connection
- *Volleyball Team Captain:* Led a varsity roster across 3+ competitive seasons earning All-State, All-Academic, All-Star, and First-Team County honors, while strengthening chemistry, competitive focus & sustained performance

ADDITIONAL SKILLS & INTERESTS

Trilingual: English, Portuguese, and Spanish

Interests: Podcasts across multiple topics, exploring nature & culture around the world, nonfiction books

JULIETA MATUS

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EDUCATION

Swarthmore College, Swarthmore, PA

May 2029

B.A. in Economics and Mathematics

Cumulative GPA: 3.75/4.00

Relevant Coursework: Introduction to Economics, Statistics, Multivariable Calculus, Linear Algebra

PROFESSIONAL EXPERIENCE

Swarthmore Campus Store | Swarthmore, PA

Customer Service Assistant

January 2026 – Present

- Delivered high-quality customer service in a fast-paced retail environment, while also resolving phone inquiries
- Operated POS system during opening and closing shifts, ensuring accurate cash handling and transaction records
- Restocked inventory and organized merchandise displays to maintain product availability and store presentation

Bethesda Scholars | Bethesda, MD

Tutor

September 2024 – Present

- Provided academic support to 10 middle and high school students with a focus on Math, Spanish, and Science
- Planned individualized lessons on weekly basis to assist students with assignments and prepare for exams
- Collaborated with students, parents and the tutoring company to track progress and adjust learning strategies

Intercultural Center | Swarthmore, PA

Latin Heritage Month Planning Member

September 2025 – December 2025

- Led initiatives to build a strong sense of community for Latin American students by organizing events
- Managed a \$4,000 budget, allocating funds across events, materials, and programming to support initiatives
- Designed promotional materials to enhance engagement with events celebrating Latin American heritage

BOMA Chile | Remote

Business Development Intern

August 2024 – June 2025

- Supported the CEO and his projects with research synthesis, meeting preparation, and operational follow-up to help expedite action items and maintain continuity across ongoing business development efforts and initiatives
- Analyzed market trends and synthesized research to support new business initiatives and expansion strategies
- Created a promotional video for one of BOMA Chile's event, from concept development to final editing, which was used across their social media platforms, contributing to a 20% increase in event visibility and attendance

LEADERSHIP AND EXTRACURRICULAR

MAP x UBS | Remote

Investment Banking Summer Fellow

June 2026 – Present

- Complete 5+ weekly interview drills covering leadership, teamwork, communication, and conflict resolution
- Chosen as the top 15% of 650+ applicants, focused on IB recruiting, technical prep and private equity strategy

Girls Into Venture Capital | Swarthmore, PA

Fellow

September 2025 – Present

- Collaborated with peers as a fellow in a selective VC-focused club, contributing to discussions and absorbing insights from industry panels to strengthen analytical and professional readiness for finance environments
- Advocated for closing the gender gap in VC through discussions and panels to empower emerging female leaders
- Participate in bi-weekly meetings covering an introduction to VC and attend lecture panels with industry experts

Swarthmore College Field Hockey | Swarthmore, PA

D3 NCAA Student-Athlete

August 2025 – Present

- Balanced 20+ hours per week to training, competition, and travel while balancing a full academic course load
- Utilized a strong work ethic, discipline, and accountability in daily practices, ensuring all team standards are met

Washington Wolves Field Hockey Club | Bethesda, MD

Coach

March 2024 – May 2025

- Coached kids (8-12) in field hockey fundamentals, fostering teamwork, sportsmanship, and skill development
- Communicated regularly with parents and the head coach to discuss player progress, goals, and upcoming events

SKILLS & INTERESTS

Skills: Spanish (Native), Java, Python, R, Microsoft Office, Google Suite

Interests: Field Hockey, Traveling, Table Tennis, Minecraft, Cooking (HelloFresh Guru), Running (Track)

KATE I. AMBROSE

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EDUCATION

Lafayette College – Easton, Pennsylvania

GPA: 3.75/4.0

B.A. in Economics

2025-2026

- Accomplishments: Division 1 Field Hockey

University of Delaware – Newark, Delaware

B.S in Finance

Anticipated Graduation: 2029

PROFESSIONAL EXPERIENCE

MAP x Bank of America — *Winter Investments Pro-Bowl Fellow* | Remote

12/2025 – Present

- Selected as 1 of 50 NCAA athletes nationwide (10% acceptance rate from 500+ applicants) for a 10-week investment banking fellowship sponsored by Bank of America.
- Delivering 10+ weekly assignments covering accounting, valuation, and transaction analysis, maintaining a 98% composite performance score and perfect submission record.
- Collaborating with student-athletes from 15+ Division I universities to prepare sponsor-evaluated pitch materials, strengthening analytical storytelling and client-readiness.
- Expected to deliver a client-ready presentation to Bank of America leadership on March 23, 2026, outlining valuation, synergy, and integration strategy for a private-equity healthcare acquisition.

Lang Development Group – *Commercial Real Estate Development Intern* | Newark, DE

12/2025 – Present

- Assisted the project management team with budgeting and cost analysis for new apartment developments by reviewing vendor proposals and conducting price comparisons, directly supporting informed financial decisions during the construction planning process.
- Collaborated with cross-functional team members in construction planning and internal meetings, gaining hands-on exposure to how coordinated efforts across departments improve efficiency, cost control, and overall project financial outcomes.
- Organized and tracked financial and operational data to support development workflows, strengthening understanding of commercial real estate project execution and the relationship between planning, budgeting, and financial performance.

Buffalo Wild Wings – *Hospitality Assistant* | Newark, DE

02/2025 – 05/2025

- Managed takeout operations by coordinating high-volume orders, verifying accuracy, and prioritizing efficiency during peak hours, ensuring timely service while maintaining strong attention to detail in a fast-paced, customer-focused environment.
- Supported front-of-house operations by seating guests, managing waitlists, and communicating effectively with team members, contributing to smooth service flow and consistently positive guest experiences.
- Resolved guest concerns professionally by addressing issues promptly and accurately, strengthening communication skills and maintaining composure under pressure while upholding brand standards.

LEADERSHIP & COMMUNITY DEVELOPMENT

Lafayette College's Women's Varsity Field Hockey – *NCAA Division 1 Student-Athlete* | Easton, PA

07/2025 – Present

- Training 25+ hours weekly while maintaining a rigorous academic schedule, strengthening time-management, discipline, and performance under pressure in a highly competitive Division I environment.
- Contributing to a high-performing Division I program by executing game strategies, maintaining accountability, and supporting team objectives.
- Representing the program in team meetings and events, demonstrating leadership, professionalism, and accountability.

B+ (Be Positive) Foundation (Student Chapter) – *President* | Newark, DE

09/2024 – 06/2025

- Led year-round fundraising initiatives by planning events, running executive meetings, and coordinating volunteers, ultimately raising over \$48,000 to support families affected by childhood cancer.
- Developed awareness campaigns through school events and outreach efforts, increasing student engagement and participation while strengthening partnerships with faculty and local community supporters.
- Managed budgeting, event logistics, and post-event evaluations to ensure efficient use of funds and measurable impact toward organizational fundraising goals.

Newark Charter High School & Delaware Sharks Club – *Captain, Varsity Field Hockey Team* | Newark, DE

08/2024 – 11/2025

- Led and represented teammates by setting performance standards, fostering accountability and a positive team culture, and modeling professionalism, resulting in stronger communication, cohesion, and on-field execution while balancing academic and athletic commitments.

National French Honors Society, Newark Charter School – *Leader/Secretary* | Newark, DE

09/2024 – 05/2025

- Managed member communication by drafting announcements, organizing agendas, and distributing materials for bi-monthly meetings, ensuring clear coordination between students and faculty advisors.
- Supported leadership initiatives by assisting with event planning and administrative tasks that promoted student engagement in French language learning and cultural enrichment.

NON-TECHNICAL SKILLS & INTERESTS

- Skills and Language(s): English (native), French (basic proficiency), Public Speaking, Presentation Design
- Programs: Microsoft Word, PowerPoint, Canva
- Interests: Financial Markets, Real Estate Development, Business Development, Competitive Athletics, Leadership in Team Environments

Keira CR. Donnelly-Sallows

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EDUCATION

Princeton University

Princeton, NJ

Bachelor of Science in Operations, Research, Financial Engineering | Minor in Statistics and Machine Learning

Expected Graduation: May 2029

- **Cumulative GPA:** 3.75/4.0 | **SAT:** 1590
- **Accomplishments:** Academic and All Round Scholar (Brighton College), British Education Award Winner (2022-2023)
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 07/2026)

PROFESSIONAL EXPERIENCE

Morgan Stanley

Remote

MAP Investment Banking Fellow

Mar 2026 – Present

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#)

- Alkami Technologies — *Digital Banking SaaS Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/75 NCAA athletes (~20%) to lead the Planning Phase for an MS-case, analyzing Alkami by structuring 5+ financial inputs across revenue model/cost drivers/KPIs for a prospective PE client and deliver a live recommendation on 6/8
 - Built 4+ exhibits outlining revenue scaling assumptions, AI-driven cost structure and unit economics, defining guardrails for growth, margin trajectory and capital efficiency to align the team on consistent modeling standards and decision-making criteria
 - Defined 5+ core KPIs including user growth, retention, monetization and AI usage efficiency while framing key risks around compute costs & competition, enabling team to track performance, stress-test assumptions & evaluate long-term value creation

Genomics PLC

Cambridge, UK

Apprentice to the CEO

Jun 2025 – Aug 2025

- Shadowed executive leadership at a venture-backed genomics firm, observing 5+ strategic discussions on product development, partnerships and scaling, gaining exposure to decision-making across precision medicine and commercial strategy in real time scenarios
- Analyzed interactions across 3+ technical and business teams, identifying how research, product and operations align to drive innovation, improve execution and support long-term growth in a complex healthcare technology environment and scaling operations

WellChild National Children's Charity

London, UK

Research Volunteer

Jun 2024 – Aug 2024

- Conducted 3+ research initiatives supporting care for seriously ill children, synthesizing findings into structured reports that informed outreach strategy and program development across a mission-driven healthcare environment with clear, actionable recommendations
- Collaborated with 5+ team members to analyze datasets and present insights, strengthening communication, independent research skills & data interpretation to support decision-making + improve organizational impact across multiple ongoing initiatives/programs

LEADERSHIP & COMMUNITY DEVELOPMENT

Princeton University | Varsity Fencing Team

Stanford, CA

NCAA Division I Student-Athlete

Sep 2025 – Present

- Compete at the NCAA level while balancing 25+ hours of training, travel and academics, demonstrating discipline, time management and consistent performance within a high-intensity collegiate athletic environment across the season against top-ranked competition
- Contribute to a 15+ member roster in training and competition, fostering collaboration, accountability and competitive execution to strengthen team culture and performance outcomes across dual meets and tournament play throughout the season with high-pressure

Great Britain | National Fencing Team

International

Women's Sabre Athlete

Jan 2022 – Present

- Ranked top 3 nationally and previously #1 (U17), competing in 10+ international events including World and European Championships, demonstrating sustained elite performance against top global competition in multiple high-pressure stages & seasons
- Achieved 7th place at the U17 World Championships and secured 3+ national titles, reflecting consistent results, competitive resilience and high-level execution across multi-year international competition cycles against elite global peers/fencers on the international stage

Brighton College

Brighton, UK

School Prefect

Sep 2023 – May 2025

- Selected as 1 of 20+ prefects to represent the student body, acting as a liaison between 1,000+ students and faculty to communicate feedback, improve policies and strengthen community alignment across the school through regular meetings and structured feedback
- Mentored 15+ younger students while leading 5+ initiatives and events, contributing to school culture, leadership development and student engagement through consistent involvement and ongoing peer support across academic, social and extracurricular settings

Morgan Stanley

London, UK

Women In Banking Insight Program Participant

Jun 2024 – Jun 2024

- Selected for a competitive insight program across 3+ investment banking divisions, gaining exposure to financial modeling, markets and corporate finance strategy to build foundational technical knowledge & strengthen interest in finance in a fast-paced environment
- Participated in 5+ workshops and case discussions on deal structuring, while networking with 15+ professionals and peers to develop commercial awareness, industry insight and a deeper understanding of investment banking workflows and client advisory processes

NON-TECHNICAL SKILLS & INTERESTS

Skills and Language(s): Strong analytical and problem solving skills; fluent in English; working knowledge of French

Programs: Java, IntelliJ, Excel, some Python | **Interests:** Fencing, applied mathematics, finance, computer science.

Knox S. Foster

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EDUCATION

Carnegie Mellon University

Bachelor of Science in Business Administration & Statistics | Concentration in Finance

Pittsburgh, PA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.6/4.0
- **Honors/Awards:** 2x ODP National Team & Preseason with Professional Team: Louisville City F.C. (Soccer)
- **Relevant Courses:** Finance, Accounting, Statistics & Data Science, Micro/Macro, Business Computing, Behavioral Economics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow

Remote

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Lovable — *AI-Powered Application Development & Software Platform (Technology M&A / Capital Markets & Strategic Advisory Simulation)*
 - Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Planning Phase for a deal team of 5, building Lovable's financial summary and operating KPI analysis for a final recommendation to UBS Directors: **Andrew Heller & John Delgado**
 - Evaluated Lovable's ~\$500M annualized revenue run rate, ~\$553M raised and debt-free balance sheet, incorporating market drivers/headwinds to assess growth, liquidity, profitability assumptions and financial risks guiding team's investment framework
 - Co-designed a 12-page pitch book analyzing \$725B of 2026 hyperscaler capex, 13.5% IT spending growth and EU AI Act compliance risks, applying 20+ hours of Wall Street Prep accounting coursework to frame Lovable's growth outlook for thesis

Scouting America

Financial Analyst

Remote

Jan 2026 – May 2026

- Analyzed 12+ expense categories to identify unnecessary spending and cost-saving opportunities, presenting recommendations to the San Francisco board that improved cash retention, supported more disciplined budgeting and helped re-direct organizational resources
- Compiled 4 social media engagement metrics across likes, comments, shares and views in Excel, using RStudio to identify performance trends & compare content effectiveness, translating audience data into recommendations that improved outreach planning for the org.

Cryo Lounge

Client Services Associate

Louisville, KY

May 2023 – Dec 2024

- Led 20+ weekly cryotherapy sessions and administered localized treatments by preparing equipment, explaining procedures and monitoring clients throughout appointments, maintaining safety standards while creating a consistently positive customer experience
- Advised clients across 3+ service packages by assessing individual needs, explaining treatment options and answering questions throughout the sales process, helping customers make informed purchasing decisions while supporting stronger service conversion/s

LEADERSHIP & COMMUNITY DEVELOPMENT

Carnegie Mellon Men's Varsity Soccer Team | [News](#)

Pittsburgh, PA

NCAA Division III Student-Athlete & Goalkeeper

Aug 2025 – Present

- Commit 25+ hours weekly to NCAA Division III soccer through goalkeeper training, strength and conditioning, film study, travel and competition while balancing Carnegie Mellon coursework, developing the preparation/consistency required to perform under pressure
- Train alongside 25+ teammates in a high-performance environment while managing demanding athletic and academic schedules, applying film review, technical preparation + coach feedback to improve goalkeeper decision-making and contribute depth to the team

Pi Kappa Alpha (PIKE)

Greek Sing Head Chair & Social Chair

Pittsburgh, PA

Aug 2026 – Present

- Elected by chapter vote of 70 members to direct Greek Sing, CMU's largest annual philanthropic performance, leading production planning across casting, choreography, music and rehearsal scheduling while performing as a featured dancer and vocalist
- Oversee social programming for the 2026–27 academic year, coordinating event logistics, vendor communication and risk-management compliance with chapter leadership, IFC and Fraternity & Sorority Life, strengthening chapter engagement across campus organizations

Louisville City FC - USL League Two

Goalkeeper

Louisville, KY

May 2026 – Jul 2026

- Competed at the USL League Two level as a goalkeeper for Louisville City FC, committing to a demanding summer schedule of practices, matches and individual preparation while developing technical discipline, composure & consistency required in competition

Trinity High School

Executive House Captain

Louisville, KY

Aug 2024 – May 2025

- Led peers across 4 grade levels in planning and executing school-wide events through Trinity's house system, coordinating responsibilities and student participation while creating opportunities that increased school spirit + strengthened the entire community
- Collaborated with 10+ student and faculty leaders to represent student perspectives, coordinate leadership initiatives and communicate priorities between peers and administrators, helping organize an effective house system while improving engagement throughout year

NON-TECHNICAL SKILLS & INTERESTS

Skills: Financial & Data Analysis, Statistical Modeling, Prompt Engineering, Accounting | **Languages:** English (Fluent), Spanish (Conversational Proficiency) | **Interests:** Soccer, Golfing, Chess, Poker, Investing, Podcasts | **Programs:** Python, R, RStudio, Excel, PowerPoint, Bloomberg Terminal

Lia R. Nafe

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EDUCATION

Georgetown University

Bachelor of Arts in Economics

Washington, DC

Expected Graduation: May 2029

- **Cumulative GPA:** 3.9/4.0 | **ACT:** 35
- **Honors/Awards:** National Merit Commended Student, IL State Scholar, AP Scholar with Distinction
- **Relevant Coursework:** Linear Algebra, Multivariable Calculus, Microeconomics, Macroeconomics

PROFESSIONAL EXPERIENCE

Evansbrook Capital Management

Wealth Management Intern

Chicago, IL

May 2026 – Aug 2026

- Built a fee analysis for a prospective \$5M client by benchmarking expense ratios, advisory fees, and multi-year cost drag on current holdings against a proposed allocation, quantifying net-of-fee outcomes that supported the firm's pitch
- Analyzed SpaceX's pre-IPO profile by evaluating secondary-market marks, Starlink revenue trajectory, and comparable private-to-public transitions, building a valuation range and assessing access routes for accredited-client exposure
- Conducted equity research across semiconductors and high-growth sectors using Morningstar to compare valuation multiples, moat ratings, and fair-value estimates against street consensus, informing advisor discussions on sector positioning

Bank of America

MAP Investment Banking Fellow; Team Captain

Remote

Jan 2026 – May 2026

Selected Transaction Experience | [Pitch Book](#)

- Option Care Health — *Home & Alternate Site Infusion Services (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Led the Initiation Phase as 1/15 captains (~2%) from 654 fellows, directing a 5-person deal team through ~5 research sprints/week to recommend a fast-growth healthcare company, culminating in a live virtual presentation to BofA on 3/23/26
 - Sized U.S. Medicare TAM at ~\$1.03T and Medicare Advantage SAM at ~\$450–500B, then prioritized 3 subsectors (Home Infusion ~\$20–25B U.S., Outpatient Services ~30% of spend, Specialty Pharmacy ~\$600B+) to anchor growth drivers
 - Built an Option Care Health screening package by defining SOM as ~3–5M high-acuity MA members requiring infusion therapy, benchmarking against Optum, CVS/Coram, and regional providers, and drafting 2 key risks with mitigants

Rem and Company

Strategist

Washington, DC

Sep 2025 – Present

- Advise 4 minority-owned businesses across the broader DMV area by analyzing customer acquisition, pricing & near-term expansion needs while assessing 10+ retail corridors for a high-end client, strengthening clarity around revenue levers and path-to-scale decisions
- Coordinate with clients, architects, and brokers to benchmark rents, vacancy levels, and space availability across multiple sites, translating cross-functional inputs into financially viable recommendations that improve planning accuracy and expansion readiness

Lock Chicago Escape Rooms

Game Master

Evanston, IL

Jul 2023 – Apr 2025

- Led 100+ timed escape-room sessions by guiding teams through rapid problem-solving & safety protocols, improving group dynamics and coordination under pressure, and strengthening guest experience across diverse customer types and real-time scenarios
- Supervised multiple groups per shift while maintaining operational standards and addressing real-time issues, contributing to a 4.8-star average review rating and enhancing service reliability across sustained high-volume weekend traffic periods and peak demand shifts

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

Georgetown University Sailing Team

ICSA Division 1 Student-Athlete

Washington, DC

Aug 2025 – Present

- Train 20+ hrs/week while balancing full academic responsibilities, strengthening discipline, focus, and execution needed to perform consistently across competitive fleet-racing conditions; implement race strategies with teammates in changing on-water conditions

Community Service Projects

Volunteer

Evanston, IL

Aug 2021 – Present

- Restore local trails and support adaptive sailing programming that expands water access for athletes with disabilities; previously tutored refugee students across 3 community sites, prepared youth meal packs, and supported dementia-care programming for local seniors

Loyola Academy

Drum Major, First Chair Flute, Section Leader; Varsity Sailing Captain

Wilmette, IL

Aug 2021 – May 2025

- Coordinated rehearsals and mentored 6 musicians as Drum Major while leading a 14-member sailing team through 20+ performances, regatta prep, and 10+ planning cycles, enhancing communication flow, cohesion, and leadership impact across artistic/athletic settings

SKILLS & INTERESTS

- **Skills & Languages:** French, Excel, Financial Modeling, Statistical Analysis
- **Certifications:** Wall Street Prep — Accounting & Financial Statement Analysis; US GAAP & IFRS Reporting Differences
- **Interests:** Scuba Diving, Skydiving, Hockey, Golf, Baking

Lore O. Laniyan

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EDUCATION

Yale University

Bachelor of Arts in Economics and Applied Mathematics

New Haven, CT

Expected Graduation: June 2029

- **Cumulative GPA:** 3.92/4.0 | **ACT:** 35
- **Honors/Awards:** Division 1 Student-Athlete (Field Hockey), H. Scott Caven III Memorial Scholarship Award, Cum Laude

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

- Komodo Health — *Healthcare Data & Analytics Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Placed in the top 12% (75/654) of an IB fellowship for NCAA athletes to advance to the BofA case competition & analyze 5–7 emerging healthcare businesses while building fictional 3-statement projections & strengthening valuation clarity for deal work
 - Evaluated scalability of Komodo's healthcare analytics platform using 16M+ daily clinical encounters and AWS Marketplace distribution to assess expansion and third-party AI applications, strengthening long-term market positioning and strategic value
 - Evaluated competitive and regulatory risks including rivalry with IQVIA and potential data governance changes while outlining 2 diligence questions on partnership traction and compliance readiness, strengthening downside visibility for Bank of America

ARA Partners

Intern

Houston, TX

Jun 2025 – Jul 2025

- Produced 5+ case studies and supporting PowerPoints evaluating sustainability-focused investment opportunities by analyzing operating drivers, competitive dynamics & financial indicators, strengthening screening rigor + decision-readiness for ARA's deal team
- Reviewed multiple CIMs and conducted external research across 8–10 market sources to assess strategic fit with ARA's investment mandate, improving clarity on company positioning, risk considerations, and priority opportunities for downstream diligence
- Collaborated with a 4–6 intern team to scope sustainability-focused projects, consolidate findings into 3–4 presentation outputs, and align research threads across workflows, strengthening cross-team coordination, teamwork, and readiness for live-deal environments

Texas Pride Field Hockey Club

Coach

Houston, TX

Feb 2024 – May 2024

- Coached 50+ elementary-aged athletes by structuring weekly development sessions and tracking progress across 3–4 core skill areas, strengthening discipline, teamwork, and the consistency needed to perform effectively in a demanding multi-level training environment
- Executed a weekly coaching program and coordinated age-group competitions by managing drills, rotations, and skill benchmarks for 4+ cohorts, improving group engagement, technical development & the reliability of training workflows across diverse athlete groups
- Supported weekly program operations by preparing equipment, coordinating field setups, and assisting 3–5 age groups during drills and scrimmages, improving session flow, athlete focus & overall reliability of training environments across varied developmental levels

LEADERSHIP & COMMUNITY DEVELOPMENT

Yale University Varsity Field Hockey Team

NCAA Division 1 Student-Athlete

New Haven, CT

Aug 2025 – Present

- Commit 25+ hrs/week to Division I training, film, meetings, and travel while aligning with multi-phase game plans across 20+ seasonal competitions, strengthening execution discipline, communication, and performance consistency in high-pressure environment
- Contributed to the team's first Ivy League and NCAA Tournament appearance by adapting to strategic adjustments across weekly cycles and supporting teammates during 10+ high-stakes matchups, improving cohesion, resilience & collective competitive readiness

St. John's School Black Girl's Coalition

President

Houston, TX

Aug 2024 – May 2025

- Led mentorship programming for 10+ Black middle-school girls by structuring monthly discussions across 5+ sensitive topics and applying training from counselor-led courses, strengthening communication clarity, trust-building, and support for student well-being
- Coordinated 10+ recurring meetings and guided mentees through topics like identity, relationships, and school challenges, strengthening consistency, accessibility, and the overall quality of peer support across a PWI and broader campus community

Houston Museum of Natural Science

Teen Intern

Houston, TX

Jun 2023 – Jul 2023

- Supported 20+ simultaneous summer programs by coordinating materials, managing classroom flow, and assisting instructors in STEM-focused camps, strengthening operational efficiency and the overall experience for elementary-age students
- Helped deliver daily robotics and science lessons by distributing worksheets, guiding 15–20 students per session, and maintaining classroom organization, improving learning engagement, instructional clarity, and workflow reliability for camp staff

ADDITIONAL SKILLS & INTERESTS

Skills and Language(s): Spanish, Adobe Photoshop

Interests: Baking, fitness classes, soccer(Arsenal fan), nail art, 3D printing, film photography

LUKE B. MCCRADY

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EDUCATION

Cornell University – Ithaca, NY

SC Johnson School of Business, Nolan School

B.S. in Hotel Administration

GPA: 3.4/4.0

Graduation Year: 2029

- **Accomplishments:** On pace to make 2026 ECAC Hockey All-Academic Team
- **Relevant Courses:** Financial Accounting, Microeconomics, Business Computing, Business Writing, Organizational Behaviour and Leadership Skills

PROFESSIONAL EXPERIENCE

Adrenaline Source for Sports - Sales Associate | Calgary, Alberta, Canada

05/2024 – 08/2026 (summer employment)

- Deliver personalized hockey and baseball equipment recommendations in a fast-paced retail setting, building customer trust, driving repeat business and achieving revenue targets.
- Balance retail responsibilities with elite athletic training, maintaining product knowledge and providing dependable day-to-day customer service.
- Support merchandising and inventory operations while assisting customers, strengthening communication skills and contributing to an organized store experience.

Perfect Skating - On-Ice Instructor | Calgary, Alberta, Canada

05/2024 – 08/2026 (summer employment)

- Lead power skating sessions for athletes ages 10–20, teaching skating fundamentals and improving movement efficiency and confidence.
- Demonstrate drills and provided individualized feedback, helping athletes refine technique and accelerate skill development.
- Mentor younger players during training sessions, reinforcing accountability and building leadership through coaching.

LEADERSHIP & COMMUNITY DEVELOPMENT

Cornell Men's Hockey – Student Athlete | Ithaca, NY

08/2025 – Present

- Compete as an NCAA Division I athlete while balancing academics, representing Cornell and developing discipline and time-management skills.
- Build leadership and resilience through daily team accountability, strengthening preparation habits and supporting consistent performance.
- Collaborate with coaches and teammates under pressure, executing team systems and contributing to team success.
- Participate in school visits and alumni and donor fundraising efforts, representing Cornell Hockey and supporting community engagement.

Spruce Grove Saints / Cowichan Valley Capitals / Niverville Nighthawks - Defenseman | Western Canada

2023 – 2025

- Competed at the Junior A level across Western Canada, developing resilience, teamwork, and high-performance habits.
- Participated in community outreach programs, supporting local initiatives and building strong community connections.

Edge School – Student | Calgary, AB

2021 – 2023

- Achieved Academic Excellence with Distinction, Principal's List, Honour Roll and the Mountaineer Award while balancing athletics, demonstrating leadership and strong academic performance.
- Contributed to Leadership Council initiatives, helping organize events and strengthening student engagement.
- Organized Graduation Committee, representing peers and helping deliver a successful event.
- Balanced academics and elite athletics, winning championships such as the CSSHL Western Canadian Championship and Mac's Midget Hockey Championship while maintaining strong academic standing.

Various Charities - Community Volunteer | Calgary, AB

2018 – Present

- Raised funds and volunteered for community organizations including the Alberta Children's Hospital Foundation, Sheldon Kennedy Centre for Child Advocacy, Juvenile Diabetes Run for the Curve (JDRF), and HEROS Hockey Volunteer, supporting youth and health initiatives and creating positive local impact.

ADDITIONAL SKILLS

- Microsoft Office Excel Certification, Proficient in Word and PowerPoint
- Certification in Hotel Industry Analytics (CHIA)

Luke M. Sharp

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EDUCATION

University of Pennsylvania

College of Arts & Sciences

Philadelphia, PA

May 2029

- Bachelor of Arts in Economics | Minor in Statistics & Data Science
- GPA: 4.00/4.00 | Varsity Sprint Football

Hebron High School

Lewisville, TX

May 2025

- Varsity Football Captain | UIL State Marching Band Champion

PROFESSIONAL EXPERIENCE

Generational Group – Middle-Market Investment Bank

Richardson, TX

Valuation Intern

May 2026 – Aug 2026

- Supported sell-side M&A and valuation processes for 35+ businesses ranging from ~\$2M to \$400M+ EV
- Built DCF, comps, and transaction models contributing to 25+ Evaluation Reports and 20+ CIMs across active deals
- Engaged in 50+ client and internal calls discussing EBITDA add-backs, buyer positioning, and deal preparation
- Introduced AI-assisted workflows used by 7+ associates to streamline CIM drafting and internal LEO valuation models
- Prepared 5 confidential buyer teasers with a Vice President for live middle-market sell-side M&A engagements

Palagic Value Management LP

Dallas, TX

Investment Intern

Jun 2025 – Aug 2025

- Analyzed 10-K's, 10-Q's, earnings transcripts, and investor presentations across 12+ small-cap companies
- Developed 4 investment briefs analyzing earnings trends, valuation multiples, and management commentary
- Engaged with 8+ sell-side equity analysts to challenge assumptions, refine variant views, and validate industry outlooks

PGA Frisco Fields Ranch

Frisco, TX

Caddie

Jun 2025 – Aug 2025

- Delivered high-touch, client-facing service to executives and professional athletes over 55+ rounds at PGA HQ

ACTIVITIES

The David Network – Donor & Alumni Relations Event Coordinator

May 2026 – Present

- Coordinate donor and alumni engagement events supporting 100+ students, alumni, and professionals across Texas

Balyasny Investment Fund – Information Technology Sector Team

Mar 2026 – Present

- Selected for competitive student-managed L/S investment fund overseeing \$100K portfolio across sector-focused teams
- Analyze Information Technology equities, develop investment theses, and present pitches to Balyasny professionals

Make-A-Play Skills Challenge Fellow

Feb 2026 – Present

- Advanced to final playoff rounds of competitive finance fellowship among 375+ NCAA athletes in Databricks project
- Selected as 1 of 6 athletes twice recognized as behavioral interview exemplar and Outstanding Behavioral Interviewer

Wharton Undergraduate Hedge Fund Club – Commodities Team

Feb 2026 – Present

- Analyze commodity supply/demand dynamics and macro catalysts impacting pricing

Wharton Investment & Trading Group – TMT

Aug 2025 – Present

- Selected as 1 of 4 freshmen (100+ applicants) for competitive TMT team
- Develop sector coverage, build valuation models, and present stock pitches in internal competitions
- Publish weekly Substack providing market updates on semiconductor and AI infrastructure companies

KKR Scholars Program

May 2026

- Selected as 1 of 22 students from 3,000+ applicants for immersive private markets program at KKR headquarters

LEADERSHIP & SERVICE

Penn Mentorship Program – Executive Board Member (Events)

Philadelphia, PA

- Selected to the 8-member executive board launching Penn's new mentorship program
- Lead event planning and mentor engagement initiatives, supporting deployment of a ~\$15K annual programming budget

Big Brothers Big Sisters – Mentor

Philadelphia, PA

- Provided 2+ hours of weekly one-on-one mentorship to a Philadelphia youth

Dec 2025 – May 2026

ADDITIONAL INFORMATION

Plexus Saxophone Quartet Member: Performed at New York City's Lincoln Center and on NPR's *From The Top*; winner of prestigious Fischhoff International Chamber Music Competition; awarded top honors in international competitions

Skills: Excel, PowerPoint, Python (Pandas, NumPy), Bloomberg Terminal, Capital IQ, Bloomberg Market Concepts

Interests: Ironman 70.3 | Baseball | Golf | Running | Piano | Alto Saxophone | Skiing | Watersports | Fishing | Hiking

Luna Bian

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EDUCATION

Wellesley College

Bachelor of Arts in Mathematics | Philosophy Minor

Wellesley, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0
- **Organizations:** WeStart (Publicity Chair), Wellesley Investment Society, Student-Athlete Advisory Committee
- **Relevant Coursework:** Laboratory in Investments (MIT 15.417), Linear Algebra, Introduction to Microeconomics

PROFESSIONAL EXPERIENCE

The Amazing Group

Investment Banking Analyst

Los Angeles, CA

August 2026 - Present

- Analyze financials, business models, and market trends for 10 internet, semiconductor, cybersecurity, and software companies.
- Create 20+ valuation models, company profiles, and investment presentations supporting technology M&A transactions.

Harvard-MIT Health Sciences and Technology

Healthcare Innovation Research Intern

Cambridge, MA

May 2026 - August 2026

- Analyzed data from 500 healthcare startups to evaluate how team composition impacts long-term company performance.
- Built a “lived experiences” scoring model to quantify human perceptions of diversity as one of 12 diversity dimensions.

BlueHub Capital

Community Development Finance Intern

Boston, MA

May 2026 - July 2026

- Tested and improved internal AI prompts used by 50 employees to increase efficiency for finance and nonprofit workflows.
- Automated property URL retrieval for 550 properties with a custom script, improving data collection for the mortgage team.
- Managed the migration and quality control of 4,500+ candidate records from 2019-2025 across internal organizational systems.

The Davis Museum

Student Visitor Assistant

Wellesley, MA

September 2025 - Present

- Assist 50+ visitors weekly by providing information on exhibits and ensuring a safe, welcoming, and engaging experience.
- Collaborate with 30+ staff to support events, exhibitions, and visitor engagement initiatives across museum programming.

Independent Tennis Instruction

Tennis Coach

Buffalo Grove, IL

June 2023 - August 2025

- Coached and mentored 20+ young athletes through personalized instruction, developing technical skills and a growth mindset.
- Designed and executed individualized training plans to improve technique, consistency, and overall athletic performance.
- Managed scheduling, client communications, and coordination with families to deliver a high-quality experience for the student.

LEADERSHIP & ACTIVITIES

UBS

Make a Play Investment Banking Fellow

Remote

June 2026 - Present

- Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Planning Phase for a 5-person deal team, recommending Celonis as a European AI process intelligence acquisition target to UBS bankers during a live final presentation in August.
- Built a financial summary evaluating Celonis' estimated LTM and 2026E EBITDA margins, competitive positioning and profitability profile, benchmarking 3 European software market trends to establish the deal team's financial framework.

Wellesley College Varsity Tennis Team

NCAA Division III Student-Athlete

Wellesley, MA

August 2025 - Present

- Balance 10-15 hours per week of tennis practices, lifts, and matches with rigorous academics and extracurricular commitments.
- Collaborate closely with coaches and teammates to develop strategies, analyze opponents, and improve team performance.

Access Distributed

Incoming Fellow

Remote

September 2026

- Selected as 1 of 60 out of 1000+ sophomores for an intensive yearlong investment banking and private equity fellowship.
- Selected to complete Financeable training and case studies in valuation, LBOs, and M&A under professional mentorship.

The Women's Network

VP of Marketing

Wellesley, MA

August 2026 - Present

- Develop outreach strategies across 10+ campus events, increasing student engagement through social media campaigns.
- Coordinate monthly with TWN's national leadership team to align chapter marketing efforts with organization-wide initiatives.

SKILLS & INTERESTS

Skills: Microsoft Office (Excel, PowerPoint, Word), PitchBook, Python, Financial Modeling, Valuation

Languages: Fluent in Mandarin (reading, writing, speaking)

Certifications: Wall Street Prep Accounting & Financial Statement Analysis, Financeable Valuation Fundamentals

Interests: Half-Marathons, Pickleball, Art Museums, Indie Pop, Natural History Museums, Writing Food Reviews

LYLA R. GELLER

Upper Saddle River, NJ | 201-470-3319 | lrg2163@columbia.edu | linkedin.com/in/lyla-geller

EDUCATION

Columbia University | May 2029

Cumulative GPA: 4.04/4.00

Bachelor of Arts in Economics

Relevant Coursework: Intermediate Macroeconomics, Calculus, Frontiers of Science

Honors & Awards: 4.00 GPA Scholar Athlete Program, Dean's List (Fall 2025, Spring 2026)

PROFESSIONAL EXPERIENCE

Briggs Capital | Boston, MA Remote

June 2026 – Present

M&A Investment Banking Intern

- Conducted M&A due diligence on an acquisition target by analyzing 3 years of financial statements and customer revenue data to evaluate EBITDA margins, customer concentration risk, and the operational capacity utilization
- Analyzed a cross-border add-on acquisition, conducting industry market research and assessing quality alignment to develop an investment thesis for Central America's only EASA accredited regional industrial services company
- Spearheaded a buy-side investment memo outlining a platform acquisition strategy for a middle-market private equity sponsor, consolidating valuation insights and market research to demonstrate significant growth potential

MAP x UBS Investment Banking | Remote

June 2026 – Present

Summer Fellow

- Build a streamlined LBO model and value-creation roadmap for U.S. expansion and operational efficiency levers
- Assess foreign exchange exposure and cross-border valuation for a European consumer-tech private equity target
- Strengthen IB interviewing proficiency through weekly mock interviews and feedback from finance practitioners

Online Fitness Coaching | Remote

November 2025 – Present

Sales Associate & Client Acquisition

- Conducted market research on local gyms to identify and qualify prospective clients, executing 50-100 tailored daily outreach messages yielding a 40% response rate with systematic follow-ups to build rapport and book calls
- Led bilingual (English/Spanish) sales calls to articulate service value, address objections, and secure enrollments
- Leveraged consultative selling and objection-handling training generating \$20k in coaching revenue in 3 months

ZIYNX | Remote

October 2025 – November 2025

Intern

- Enhanced career readiness through weekly collaborative professional development sessions with fellow student-athletes, building financial communication and strategic thinking skills under competitive recruitment pressures
- Developed market research and strategic analysis skills through structured modules and coaching on stock markets and financial literacy, applying learnings to analyze company and market trends, to make informed investments
- Crafted elevator pitches and self-promotional videos, pursuing NIL deal opportunities to build a personal brand

LEADERSHIP AND EXTRACURRICULAR

Columbia Varsity Soccer | New York, NY

August 2025 – Present

Forward

- Balanced 25+ weekly hours of training, competition, scouting, and film study with a full-time academic workload
- Contributed to a Columbia team that earned qualification for and competed in the 2025 Ivy League Tournament

Columbia Youth and ID Soccer Camps | New York, NY

June 2025 – Present

Coach

- Collaborated with 4-6 counselors to plan and lead daily activities for 15-20 campers, tailoring to varied skill levels
- Evaluated prospective recruits at Columbia ID camps and communicated detailed assessments to coaching staff

Northern Highlands Girls Soccer | Allendale, NJ

August 2021 – November 2024

Captain

- Led the team to a state championship as a three-time leading goal scorer and helped secured two sectional titles
- Achieved 1st Team All-State and County, Top "20" in NJ, All-Region Honors across four seasons of competition
- Collaborated with coaches and co-captains in weekly performance reviews to analyze team challenges, develop actionable solutions, and implement strategies to drive improvements in execution, communication, and results

SKILLS & INTERESTS

Skills: Conversational Spanish, Python, Canva, Google Workspace, Microsoft Office Suite, Due Diligence

Interests: Soccer Coaching, Philosophy, Stock Investing, Running, Lifting, Entrepreneurship, Skiing, M&A

Mark A. DiMaggio III

+1 (914) 548-4976 | Rye, NY | mark.dimaggio@yale.edu | [linkedin.com/in/mark-dimaggio](https://www.linkedin.com/in/mark-dimaggio)

EDUCATION

Yale University

Bachelor of Arts in Economics

Cumulative GPA: 3.90/4.00

New Haven, CT

Expected May 2029

- **Accomplishments:** Two-time USRowing Youth Summer National Champion, AP Scholar with Distinction (2024, 2025)
- **Relevant Coursework:** Introductory Microeconomics, Introductory Macroeconomics, AP Calculus BC (5), AP Statistics (5)
- **Independent Coursework:** Financial Statement Analysis for Investment Banking and Asset Management (London School of Economics, A+), Wall Street Prep Accounting & Financial Statement Analysis, Oliver Wyman First-Year Immersion Program

PROFESSIONAL EXPERIENCE

Morgan Stanley

Investment Banking Fellow (Make a Play Foundation)

Remote

Mar 2026 – Aug 2026

- Selected to direct the Execution Phase for a 5-person team, building the valuation and risk analysis behind a recommendation on Marvell Technology delivered to Morgan Stanley; ranked 7th overall among 450+ participants based on individual performance
- Assessed investment risk across hyperscaler revenue concentration, foundry dependence, and U.S.-China export exposure
- Triangulated enterprise value using DCF, public comparables, and semiconductor precedent transactions, concluding ~25% upside to a ~\$178B implied value

Lumenalta

Strategic Solutions Intern

Remote

Jun 2026 – Aug 2026

- Supported the Strategic Solutions team (the bridge between sales and delivery) at an AI-first technology consultancy, building business fluency through 19 C-suite and cross-functional 1:1s across client delivery, internal product development, and process automation
- Shadowed a data-modernization engagement and built an agentic AI plugin converting weekly client-meeting recordings into leadership status reports, using multi-agent evaluations to prevent hallucinations and cutting ~1.5 hours of PM workload per week
- Orchestrated the end-to-end development of a full-stack networking app (interest-based directory, automated coffee-chat scheduling with calendar invites, Slack integration) for a 400-person remote company, deployed to production on company infrastructure
- Designed a plugin for the Chief Revenue Officer that runs layered diligence on former employees and client-side alumni to construct tiered warm-outreach pipelines, delivered as formatted and sourced spreadsheets filterable by current employer revenue and industry

J.P. Morgan

Asset & Wealth Management Fellow (Make a Play Foundation)

Remote

Jun 2026 – Present

- Selected as 1 of 50 NCAA athletes nationwide (10% acceptance rate from 500+ applicants) to lead portfolio construction for a professional-athlete wealth management case study, following coursework in portfolio strategy, asset allocation, and financial planning
- Addressed U.S./Canada jock-tax exposure through residency planning, a dedicated tax reserve, and prioritized retirement contributions
- Built a layered liquidity strategy for career-ending injury risk using an 18-month reserve, Roth IRA contributions, and a securities-based line to avoid forced asset sales

Yale Undergraduate Capital Partners

Analyst

New Haven, CT

Feb 2026 – Present

- Selected through a competitive interview process to join Yale Undergraduate Capital Partners, supporting partner venture firms with \$33B+ aggregate AUM through 6–8 hours/week of startup sourcing, industry research and investment diligence
- Built a sourcing and diligence pipeline for Connecticut Innovations within the Edge AI vertical, sourcing startups through PitchBook, web research, and founder outreach before filtering on TAM, moat, traction, and team quality and narrowing the pipeline to 2 finalists
- Delivered investment recommendations on two early-stage startups, prompting Connecticut Innovations to reconsider its prior investment view of Target Arm through analysis of market opportunity, product defensibility, customer traction, and investment risks

LEADERSHIP & COMMUNITY DEVELOPMENT

Yale University | Men's D1 Varsity Lightweight Crew

Student-Athlete

New Haven, CT

Aug 2025 – Present

- Commit 40+ hours/week to rowing training, travel, competitions, and team responsibilities while balancing a rigorous academic workload at Yale University, strengthening time management, resilience, and accountability within an elite student-athlete environment
- Represent Yale University in high-level collegiate rowing competitions and year-round team events, collaborating closely with coaches and teammates to execute shared performance goals

SKILLS & INTERESTS

Skills: Microsoft Office Suite, PitchBook, Financial Modeling, Claude Code, AI Workflow Automation, Spanish (Intermediate)

Interests: Artificial Intelligence, Skiing, Collectibles, Poker, Rock Climbing, Saxophone (3 High School Music Department Awards)

Matthew D. Hofmann

4001 Stanford Avenue, Dallas, TX 75225 ♦ mdh5@williams.edu ♦ 214.957.7796 ♦ LinkedIn

EDUCATION

Williams College	2025 – Present
- Economics & Mathematics Double Major - Varsity Lacrosse Player Williams Business Review Purple Mountain Partners	GPA: 3.86/4.00
Tuck School of Business at Dartmouth — <i>Tuck Business Bridge Program</i>	June 2026
- Selected for a highly competitive 3-week MBA faculty-taught program covering financial accounting, corporate finance, managerial economics, strategy, Excel modeling, and organizational leadership. - Built a three-statement model and DCF valuation for Ryder System, Inc., including revenue driver assumptions, segment-level analysis, and terminal value reconciliation, and presented findings to industry executives and faculty.	
St. Mark's School of Texas	2021 – 2025
- GPA: 4.33 Weighted 4.0 Unweighted 35 ACT Composite - Awards: St. Mark's School Flag Recipient (1/102), Davey O'Brien High School Scholarship Finalist (1/5 in DFW Metroplex)	

PROFESSIONAL EXPERIENCE

Highway — <i>Solutions Engineering Associate</i>	July – August 2026
- Executed SQL queries across Highway's freight database to analyze load tracking performance for RXO Logistics, one of the nation's largest freight brokerages; modeled four brokerage interventions projected to improve ELD tracking rates by ~6 percentage points across 1,579 active loads and delivered findings directly to RXO's logistics team. - Prepared strategic business documents assessing expansion feasibility into adjacent freight verticals and conducted competitive market research on fintech and insurtech integration—analysis that preceded the company's subsequent product expansion announcement.	
Make-A-Play Foundation x UBS — <i>Remote Investment Banking Summer Fellow</i>	June 2026 – Present
- Selected as 1 of 500 NCAA athletes nationally for MAP's Moneyball Fellowship sponsored by UBS; advanced to the Final Round of Playoffs (top 60 nationally) and currently competing in the Pro Bowl phase. - Built a three-statement model and DCF for Helsing AI, a European defense technology company; backed into implied revenue using EV/Revenue peer comps and forecasted forward with justified assumptions to derive an internal equity valuation and market premium.	
Sewell Lexus of Dallas — <i>Summer Sales Associate</i>	June – August 2025
- Partnered with senior sales associates through the complete client engagement cycle—from initial consultation to vehicle delivery—engaging 100+ customers and contributing to client satisfaction in a high-volume luxury retail environment. - Conducted test drives, supported vehicle appraisals, and coordinated logistics across sales and service operations, developing strong client communication and analytical skills applicable to client-facing roles.	
Old House Capital — <i>Summer Real Estate Investment Analyst</i>	June – August 2024
- Analyzed CBRE, Linneman Letter, and CoStar data to build Houston Industrial market profiles—identifying cap rate expansion risk amid rising interest rates and historically low vacancy—used in quarterly investor reporting. - Built Excel-based sales comp models and a centralized comp database to support asset management decisions and ArcGIS analysis.	
St. Mark's Youth Lacrosse — <i>Coach</i>	Spring 2021 – Spring 2025
Coached St. Mark's youth lacrosse teams for 4 consecutive seasons, delivering position-specific skill instruction and mentoring aspiring athletes transitioning to the varsity program.	

LEADERSHIP & COMMUNITY DEVELOPMENT

Williams Men's Lacrosse — <i>Player</i>	2025 – Present
Balance 30+ hours per week of NCAA Division III varsity competition as a contributing defenseman while maintaining a 3.86 GPA.	
Williams Business Review — <i>Column Director</i>	2025 – Present
Lead Williams Business Review's macroeconomic section as Column Director, editing contributor drafts, approving articles for publication, and advising writers on topic selection and analytical framing.	
Purple Mountain Partners — <i>Student Analyst</i>	Spring 2026 – Present
- Pitch equity investments to LPs and conduct fundamental analysis for a student-managed six-figure value investing fund. - Build expertise in financial statement analysis and portfolio construction through hands-on investment management.	
Williams Investment Group — <i>Student Analyst</i>	2025 – 2026
Built investment theses, performed valuation analysis, and presented recommendations for a student-run six-figure long-only equity fund.	
St. Mark's Student Council — <i>Executive President (12), Class President (9,10,11)</i>	2021 – 2025
Led the St. Mark's student community and fostered a positive and energetic environment around campus. Planned and executed events such as school homecoming events, weekly upper school assemblies for 400+ students, and Zierk Athletic Center ribbon cutting.	
ReMarker Newspaper — <i>Managing Editor (12), Life Section Editor (11), Staff Writer (10)</i>	2022 – 2025
Wrote the publication's most important and complex stories, redesigned the newspaper, led pitch meetings and visual-direction days, managed section editors, and worked closely with the faculty advisor.	

SKILLS, CERTIFICATIONS & AWARDS

Microsoft Office: Microsoft Excel, PowerPoint, Word, Outlook.

Technical & Analytical Skills: Financial Modeling, Valuation Analysis, Data Analysis, Market Research, Python, SQL.

Interests: Deep sea fishing, crossword puzzles, automobiles (industry and enthusiast interest).

Matthew Collin Newbold

(913)-998-0358 | mnewbold@sas.upenn.edu | Overland Park, KS

EDUCATION

University of Pennsylvania – Philadelphia, Pennsylvania
Bachelor of Arts in Economics | SAT: 1480

Expected Graduation: May 2029
Cumulative GPA: 3.75/4.0

Relevant Coursework: Microeconomics, Macroeconomics, Calculus I, Markets and Morality

Organizations: Wharton Undergraduate Sports Business Club, Wharton Hedge Fund Club, Wharton Asia Exchange, Admission Dean's Advisory Board, Wealth Management Club, International Business Economics Club, Penn Equity Research Club

PROFESSIONAL EXPERIENCE

AltCap

Impact Data Analyst Intern

Kansas City, MO
Jun 2025 – Aug 2025

- Assigned to data projects focused on analyzing AltCap's historical lending data
- Uncovered insights through over 1200 loans and funds that can inform future lending strategies and community impact
- Learned how to navigate through company data by using Egnyte, Excel, and Salesforce

Wharton Hedge Fund Club

Commodities Team Analyst

Philadelphia, PA
Jan 2026 – Present

- Build weekly commodities market briefs that tracks how catalysts in interest rates, exchange rates, and geopolitics and their impact on futures of metals
- Presents recommendations on trade thesis with defined entry/exit levels, key risks, and scenario analysis

MAP x Morgan Stanley

Spring Investment Banking Fellow

Remote
Mar 2026 – May 2026

- Selected as 1 of 50 NCAA athletes nationwide (10% acceptance rate from 500+ applicants) for a MAP Fellowship focused on Investment Banking career preparation
- Complete 5+ weekly interview preparation drills covering leadership, teamwork, conflict resolution, and failure reflection
- Compete in weekly mock interviews simulating Superday intensity, hosted by MAP professionals and alumni across finance and consulting
- Network with Morgan Stanley investment banking professionals to gain perspective on deal teams, recruiting expectations, and sector coverage groups

LEADERSHIP AND EXTRACURRICULARS

University of Pennsylvania Sprint Football

NCAA Division 1 Varsity Athlete

Philadelphia, PA
August 2025 – Present

- Selected to earn a walk-on spot on the Varsity Sprint Football Program that competes in the Collegiate Sprint Football League (CSFL)
- Competing at positions such as Center, Offensive Guard, Defensive Tackle, and Special Teams
- Committed 25 hours weekly in season and 6 hours weekly during the off season of personal time
- Developed mental and physical toughness, learned leadership, and improved time-management

Admissions Dean's Advisory Board

Board Member

Philadelphia, PA
Sep 2025 – Present

- Selected as 1 of 14 Students in the university to work with the Admission Dean and her office; acts as a liaison between the undergraduate student body and the Penn Admissions office
- Provide authentic and diverse student perspectives on admissions initiatives as a perspective student for incoming first-years

National World War I Museum and Memorial

Volunteer

Kansas City, MO
Jun 2023 – Present

- Hired as the youngest active volunteer at the time of initiation
- Accumulated over 150 hours over the course of volunteering at the historical museum
- Assisted 10+ tours for families, politicians, journalists, veteran groups, student field trips, etc

Young Entrepreneurs Program Kansas City

Title/Role

Kansas City, MO
May 2025 – Aug 2025

- Selected as 1 of 18 high school scholars across the Kansas City Metropolitan Area to participate in YEPKC 2025
- Learned from current professionals and entrepreneurs about business-oriented skills and mindsets

SKILLS & INTERESTS

Languages: Mandarin (Fluent), Spanish (Elementary)

Interests: Sports, Culinary, Detailed Model Building, Complex Lego Builds, Hiking and Camping, Film Reviews, Building Computers

Maya L. de Brouwer

<https://www.linkedin.com/in/maya-luna-de-brouwer-a74919385/> • (310) 779-2100 • mayaluna@stanford.edu

EDUCATION

Stanford University: B.A. Economics | Minor in Political Science

GPA: 3.8/4.0

Student-Athlete: Division I Cross Country & Track

Relevant Coursework: Economic Analysis I, Principles of Economics, Introduction to AI, Accounting Fundamentals

PROFESSIONAL EXPERIENCE

MAP Investment Banking Fellow

Mar 2026 – Jul 2026

- Marvell Technology — AI Infrastructure Semiconductor Platform (Tech M&A / Strategic Advisory Simulation)
- Selected as 1/75 NCAA athletes (~20%) to lead the Monitoring Phase for a deal team of 5, synthesizing investment outcomes, valuation analysis and strategic recommendations into a pitch book evaluating Marvell's long-term AI infrastructure for MS
- Assessed valuation upside and infrastructure-market positioning across the semiconductor landscape, analyzing ~25% implied upside to DCF and EV/revenue midpoint valuation estimates while monitoring AI demand trends and peer multiples for team

SEO Career - SEO EDGE Participant

March 2026- Present

- Built a strong foundation in core business concepts, directly strengthening competitiveness in top-tier internship recruiting
- Strengthen interview, technical, and professional skills through targeted coaching and structured online learning
- Complete industry-specific training focused on developing technical skills, institutional knowledge, and attention to detail

NinjaOne –Business Analysis Intern | Remote

June 2026- Present

- Rotated across finance and business functions at a high-growth SaaS company, analyzing operating and financial information to support budgeting, performance tracking, and management decision-making
- Synthesized company and customer information into client-facing pitch materials, translating business trends and key takeaways into concise presentations for finance stakeholders

Venture Capital Project (Stanford Alumni) | Remote

June 2026- Present

- Evaluated 25 early-stage companies and recommended a top startup for funding
 - Selected a premier AI EdTech startup from the pool, subsequently executing a comprehensive industry analysis mapping out competitive landscape, personalized learning trends, and total addressable market
-

LEADERSHIP & COMMUNITY DEVELOPMENT

Stanford University Cross Country & Track – Student-Athlete | Stanford, CA

2025- Current

- Balance 20+ weekly hours of Division I training with a rigorous academic schedule, demonstrating discipline and time management to perform consistently in a high-performance collegiate environment across academics, athletics and daily team responsibilities
- Commit 20+ hours weekly to training, competition and recovery, building mental toughness, consistency and resilience while contributing to Stanford's 2025 NCAA West Region championship team through disciplined preparation and dependable daily habits

Mending Kids – Volunteer | Los Angeles, CA

Aug 2022- June 2025

- Participated in the Hike to Mend campaign, supporting 1 major fundraising initiative tied to a Mt. Kilimanjaro expedition while promoting awareness and helping expand access to surgical care for children globally across underserved communities
- Supported 5+ fundraising initiatives for a nonprofit providing surgical care to underserved children worldwide, contributing to event planning and donor outreach efforts that increased funding opportunities, donor engagement & overall reach

La Cañada High School Cross Country & Track – Team Captain | La Cañada, CA

Aug 2024-June 2025

- Led team practices and mentored 15+ younger athletes across weekly sessions, fostering a supportive environment while maintaining high performance standards and daily accountability habits throughout the XC/T&F season
- Organized 10+ team events and bonding initiatives for 20+ athletes, strengthening culture and cohesion while enhancing motivation and overall performance outcomes across the program in a highly competitive environment

La Cañada High School Mountain Bike Club - Women's Team Captain | La Cañada, CA

Aug 2022- Dec 2023

- Led and mentored 10+ teammates on the school's the mountain bike team, organizing practices that improved overall rider development, consistency and confidence across training, competition settings, and weekly team preparation
 - Fostered a supportive and inclusive team environment through 5+ social media campaigns and female-centered events that advanced the #moregirlsonbikes movement increasing engagement and community visibility
-

ADDITIONAL SKILLS

Skills: Excel (basic), Google Sheets, Market Analysis, Artificial Intelligence, Team Leadership

Interests: Distance running, mountain biking (national competitor), skiing, snowboarding, backpacking, global travel (U.S./Peru/Belgium citizenship)

Mckayla Childs

mckayla.childs@rice.edu | www.linkedin.com/in/mckayla-childs | Houston, Texas | 832-329-1259

Education

Rice University – Houston, Texas

Expected Graduation: May 2029

Bachelor of Art in Economics | Bachelor of Art in Business with a Concentration in Finance

GPA: 3.96 / 4.00

Relevant Coursework: Data Analytics, Financial Accounting, Leading in Organizations, Macroeconomics, Statistics and Probability

Certifications & Licenses

Wall Street Prep: Accounting & Financial Statements Analysis; Corporate Finance

Finance-able: Accounting Fundamentals; Excel Kit; M&A Fundamentals; Navigate the Filings; Valuation Fundamentals

Professional Experience

Make a Play Foundation x UBS – Investment Banking Summer Fellow and Deal Team Captain

June 2026 – Present

- Selected as 1 of 100 NCAA athletes nationwide (15% acceptance rate from 650+ applicants) for MAP's Money Ball Fellowship sponsored by UBS, focused on investment banking recruiting, technical preparation, and cross-border private equity strategy
- Complete weekly mock interviews simulating live IB recruiting intensity; ranked in top 10% of fellows on behavioral and leadership performance
- Selected as team captain to advance to the technical interview preparation round based on that ranking; preparing to lead a team case competition and presentation for UBS professionals at program conclusion (August 2026)

Selected Transaction Experience: Kraken Technologies — AI Utility Software Platform (Tech M&A / Strategic Advisory Simulation)

- Analyze ~\$1.44T global software SAM, ~\$540B AI SOM and 3 high-growth technology subsectors, evaluating AI infrastructure, utility software and energy demand trends to shape team's final thesis delivered live to UBS
- Synthesize Kraken Technologies' \$500M contracted annual revenue, 70M customer accounts, 30 utility clients and competitive peer landscape into a 12-page pitch book, applying 20+ hours of Wall Street Prep accounting work to strengthen thesis

Rice Business Summer Undergraduate Research Fellowship – Research Assistant

May 2026 – Present

- Collaborate with a team of 2 research assistants under a faculty member in the Virani Undergraduate School of Business to aid her current research concerning judgement and decision making in consumer contexts
- Build qualitative open-response surveys (3 completed) to analyze public perception of nonprofits and perceived corruption language in consumer judgment research and coded the results using R and SPSS
- Identified a finding that contradicted the team's original hypothesis, that nonprofits condemning tainted donors has no significant effect on public perception, and incorporated this into the faculty mentor's paper under submission for peer review
- Support data collection by extracting financial data from nonprofit tax filings (IRS Form 990s) to build standardized research datasets

EarlyBird Finance News and Trends – Summer Analyst

June 2026 – August 2026

- Lead a 3 person junior analyst team producing a weekly stock pitch deliverable on SLB (NYSE: SLB), issuing a buy recommendation across 3 drafts of senior analyst feedback
- Author monthly reports on oil and gas industry movements and emerging trends, including growing integration of renewables and recent M&A transactions in the energy sector, published 2 reports over the summer
- Built an energy sector deep-dive, analyzing key market trends, 5+ major players, current tailwinds and drivers, and potential risks to build a forward-looking view on industry direction

Global Delta Securities – Macroeconomic Research Analyst

May 2026 – August 2026

- Write bi-monthly fixed income and alternatives reports in partnership with 1 analyst, producing 4 firm newsletter macroeconomic, private credit, and private equity research reports referenced by the Investment Research department
- Present findings in department-wide meetings alongside 5 other analyst pairs, defending views to our department director across 4 presentations

Leadership & Involvement

Division 1 Women's Cross Country and Track & Field – Division 1 Distance Athlete

August 2025 – Present

- Train 20 hour weeks year round to practicing, lifting, team meetings, team bonding, traveling, fall, winter, and spring meets, and scouting and recruiting
- Develop strong time management, organizational, and communication skills by balancing demanding year round training schedule with a full academic workload, contributing to a culture of responsibility and accountability

Rice Undergraduate Investment Fund – Junior Analyst

May 2026 – Present

- Pitched a long position in Cheniere Energy (NYSE: LNG) due to their long-term take-and-pay contracts model and strategic international expansion, using comparable company analysis to present to the fund's board in April 2026, ranked in top 20% of pitches and received invitation to the fund
- Cover the communications sector for a student managed fund, screening 20 names per semester and surfacing the top 3 to the analyst team for further diligence and consideration for the collaborative team pitch
- Collaborate with a team of 8 on a semester group pitch, contributing industry and market research and indicative valuation to the pitch

Run Your City, Rice University Chapter – Volunteer Outreach Chair

March 2026 – Present

- Recruit Division 1 athletes to volunteer for youth track sessions, personally sourcing 5 of the organization's 15 total volunteer members
- Help lead track practices for 15-20 local children across 6 sessions per semester, fostering community engagement with Rice Athletics

Rice Athletes in Finance – Track and Cross Country Team Representative

December 2025 – Present

- Coordinated outreach and logistics for 3 of 4 events during Spring 2026, serving as the primary liaison between the board and my 45+ team members
- Grew regular attendance from Rice Cross Country/Track & Field members at events from 2 to 10 across the Spring 2026 semester

Investment Banking Launchpad Finance-able Intensive Program – Selected Member

March 2026 – May 2026

- Selected for a competitive cohort program led by a former investment banking, private equity, and hedge fund professional and Columbia Business School adjunct; accepted class median GPA 3.93
- Completed technical training across accounting, three statement modeling, DCF, comparable companies, precedent transactions, and sell-side M&A process
- Applied valuation frameworks to weekly case problems and 10-K analysis, receiving direct feedback on assumptions from practitioners and program mentor

Other Clubs: Rice Business Society, Rice Economic Forum, Rice Women in Business, Rice Holistic Garden Volunteer, Moody Business Scholars (Finance)

Skills & Interests

Skills: Microsoft Applications, Python (Foundational), R Studio (Foundational), Industry Analysis, Financial Valuation

Interests: Rating Coffee Shops, Mystery Books, Running, Gardening, 1995-2025 Horror Films, Hiking, Tennis

Michelle L. Kaneti

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EDUCATION

Brown University

Bachelor of Arts in Business Economics and Political Science

Providence, RI

Expected Graduation: May 2029

- **Cumulative GPA:** 3.7/4.0
- **Honors/Awards:** NCAA Division 1 Student-Athlete (Brown Sailing Team); New York State Seal of Biliteracy in Spanish, 2025; 2023 i420 World Championship Bronze Medalist; 4th at 2024 i420 Youth World Championship
- **Relevant Courses:** Managerial Decision Making; Management of Industrial and Nonprofit Organizations; Introduction to Comparative Politics; Cybersecurity and International Relations

PROFESSIONAL EXPERIENCE

Morgan Stanley

MAP Investment Banking Fellow; Team Captain

Remote

Mar 2026 – Jul 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Chai Discovery — *AI-Driven Drug Discovery Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/10 captains from 376 NCAA athletes (top 2%) to lead a 5-person deal team through 6 weekly workstreams, building the foundation for Chai by defining its AI research model & role in drug development to guide all downstream analysis
 - Sized Chai Discovery's opportunity, synthesizing 4+ sources to evaluate adoption across healthcare, fintech + automotive, strengthening market framing & grounding team thesis
 - Assessed Chai Discovery's positioning against 4+ peers including Isomorphic Labs and Recursion, evaluating differentiation in foundation models & partnerships while identifying execution/regulatory risks, developing mitigation strategies to defend work

MAP Sales & Trading Summer Fellow; Team Captain

June 2025– Present

- Captained a 5-person team in developing a thematic investment strategy for a fictional \$150B public pension fund, defining its 7–8% return target, risk tolerance, liquidity needs, and 20+ year investment horizon
- Analyzed macroeconomic conditions and secular trends to identify five long-term investment themes—AI, digital infrastructure, healthcare innovation, cybersecurity, and energy transition—and translate them into portfolio recommendations
- Constructed and stress-tested a \$10M multi-asset portfolio, evaluating asset allocation, position sizing, downside scenarios, liquidity, and rebalancing to target 7–8% annual returns while managing pension-fund risk

Lime Trading Corp

Risk Management Intern

Manhattan, NY

July 2026 – Present

- Researched and evaluated public financial, regulatory, and market datasets to support development of more accurate stress-testing assumptions
- Presented data-driven recommendations to improve model performance, scenario coverage, and overall risk management methodology

American Yacht Club

Sailing Instructor

Rye, NY

Jun 2025 – Aug 2025

- Designed and administered structured lesson plans for sailors ages 7-17, organizing drills and on-water instruction that strengthened leadership, communication and student development while creating a safe and well-run learning environment throughout the summer
- Taught advanced strategy and boat-handling techniques to 20+ youth sailors, emphasizing safety, teamwork and technical execution that improved confidence, race readiness and on-water decision-making across practices, competitions and daily instructional sessions

LEADERSHIP & COMMUNITY DEVELOPMENT

Brown University Sailing Team

NCAA Division 1 Student-Athlete; Freshman Captain

Providence, RI

Aug 2025 – Present

- Coordinate underclassmen members of the Brown Sailing Team, supporting onboarding, communication and team integration with upperclassmen for 15+ athletes while strengthening class cohesion, accountability & a smooth transition into D1 college athletics

Fuller Center Club

Founder and President

Mamaroneck, NY

Nov 2022 – Jun 2025

- Founded a service club partnered with the Fuller Center for Housing of Greater New York City, advancing 5+ housing and disaster relief initiatives that expanded local community support, volunteer impact and increased student participation across service events
- Managed a team of 25+ high school volunteers attending fundraising events and hands-on service projects, improving event execution, volunteer engagement and community impact while building leadership experience across a growing student organization

Brown Business & Investment Organizations

Active Member (Women in Business)

Remote

Nov 2025 – Present

- Participate in weekly meetings, lectures and stock pitch sessions across multiple student organizations, building a high-level understanding of industries, markets and investing while strengthening technical training through hands-on learning experiences
- Develop skills in Excel, networking, professional communication and ESG-integrated financial research, combining traditional investment analysis with values-based frameworks that improved technical readiness & preparation for finance recruiting opportunities

NON-TECHNICAL SKILLS & INTERESTS

Skills: Wall Street Prep Accounting Crash Course Certification, Conflict Resolution, Communication, Basic Network & System Admin.

Organizations: Brown University Women In Business; Brown University Sailing Team

Interests: Formula 1, Jazz, Trivia

MICHELLE WOO

[LINKEDIN PROFILE](#) • (510) 738-7483 • MICHELLEIKWOO@GMAIL.COM

EDUCATION

University of California, Berkeley – Berkeley, CA

GPA: 3.7/4.0

B.A. in Economics

Anticipated Graduation: May 2029

- Awards & Honors: All ACC Academic Team, WGCA All American Scholar, American Junior Golf Association Rolex Scholastic All American, Mission San Jose High School Tower Award Recipient, Castlewood Country Club Junior Merit Scholarship Recipient, 4x Mission Valley Athletic League Varsity Golf MVP
- Relevant Courses: Introduction to Economics, Foundations of Business, Calculus I

PROFESSIONAL EXPERIENCE

Fong, Ko Associates LLP – Finance and Accounting Intern | San Mateo, CA

June 2026 - Present

- Collaborated with senior accountants to support individual and business tax return prep by verifying e-files, invoices, and client payment records.
- Performed bookkeeping in QuickBooks by reconciling corporate bank and credit card statements and recording financial transactions for clients.
- Supported daily operations by communicating with the California Franchise Tax Board and maintaining company-wide client records in Excel.

MAP x UBS – Summer Investment Banking Fellow | Remote

May 2026 - Present

- Selected as 1 of 50 NCAA athletes from 500+ applicants for an investment banking fellowship evaluating a cross-border M&A acquisition target.
- Completing 20+ hours of Wall Street Prep accounting and valuation training, including financial statement analysis and DCF modeling.
- Delivering a live investment recommendation and 12-page pitch book to UBS bankers on Aug. 17 with 5 person deal-team.

Citibank Division 1 Athlete Development Program - Participant | Remote

May 2026 - Present

- Selected as 1 of 30 participants from 300+ applicants for Citigroup's 2026 D1 Athlete Development Program, a virtual mentorship initiative for NCAA Division 1 student-athletes pursuing careers in financial services.
- Participate in senior speaker sessions, business workshops, technical trainings, and networking events with Citi professionals across teams.
- Receive one-on-one mentorship and career guidance from program alumni currently working at Citi.

Castlewood Country Club – Junior Camp Volunteer Assistant Coach | Pleasanton, CA

June 2023 - Present

- Serve as an assistant golf coach to 30 beginners from ages 5-14 for 3 weeks each summer, 20+ hours each week.
- Set up and create drills and games for kids to effectively develop their basic technical skills while teaching them etiquette.

Learning Bee Learning Center – Summer Camp Volunteer Teacher's Assistant | Fremont, CA

June 2023 - August 2024

- Served as teacher's assistant and taught 60+ students from ages 7-12 for 3 weeks each summer, 30+ hours a week.
- Designed instructional activities to learn foundational STEM skills and led recreational programs that fostered an engaging learning environment.

LEADERSHIP & COMMUNITY DEVELOPMENT

University of California, Berkeley Golf – NCAA Division 1 Student-Athlete | Berkeley, CA

August 2025 - Present

- Dedicate 30+ hours a week to practice, workouts, team meetings, and tournaments while collaborating with teammates and coaches.
- Balance a year long athletic schedule while maintaining a rigorous course load, using good time management skills to account for missed classes.
- Competed in the starting lineup across every freshman-season tournament, recording 1 runner-up finish and 3 top-15 finishes while posting the team's lowest fall scoring average, demonstrating rapid adaptation and consistent competitive excellence early in my career.

Athlete to Athlete – College Athlete Mentor | Remote

January 2026 - Present

- Conduct weekly virtual mentoring sessions with 2 long-term prospective collegiate athletes ages 13 and 16, sharing recruiting insights, goal-setting frameworks, and collegiate golf experiences to provide guidance toward playing golf at the collegiate level.
- Use personal stories to inspire and strengthen their overall confidence, motivation, and long-term athletic development

Mission San Jose High School ASB Student Government – Elections Committee Head & Link Crew | Fremont, CA

August 2023 - May 2025

- Dedicated 15+ hours weekly in ASB to plan school-wide events to strengthen student engagement, including Homecoming with 1,000+ attendees.
- Elected Head of the Elections Committee, leading my committee to plan and execute school-wide elections for 1,500+ student voters and organizing the annual ASB debate for 200+ attendees.
- Selected as 1 of 10 student panelists to mentor Mission San Jose High School underclassmen and share advice on academic and personal success.

Mission San Jose High School Varsity Golf – Two Year Captain | Fremont, CA

August 2021 - May 2025

- Played as the top player all four years and dedicated 10 hours a week to team practices and matches.
- Earned 4x league MVP honors and led team to first sectional win in history, later finishing as California state runner-up individually in 2022.
- Elected as captain for 2 seasons and assisted coaches with strategy, helped new players, and planned team bondings, fostering a strong team culture.

NON-TECHNICAL SKILLS & INTERESTS

- Skills and Language(s): Collaboration, time management, problem solving, adaptability, fluent in Cantonese and Mandarin
- Programs: Excel, Powerpoint, Canva, Photoshop
- Interests: Hiking, Sports, Daily NYT games, Poké enthusiast, Depop reselling

Nina Rastin

nina_rastin@brown.edu | (469) 990-6338 | www.linkedin.com/in/nina-rastin

EDUCATION

Brown University | Providence, RI

Anticipated Graduation: May 2029

B.A in Business Economics and the Entrepreneurial Certificate

- **GPA: 3.89/4.0**
- **CTB:** Awarded by Brown Women's Crew to one freshman who was the grittiest racer with the ability to attack every challenge with no fear.

The Episcopal School of Dallas | Dallas, Texas

- **Stephen B. Scholar Athlete Award:** Awarded to 1 senior girl who demonstrated the highest standards of academic scholarship and varsity athletic excellence. Recognized for outstanding community leadership, work ethic, and character as a primary contributor to varsity sports.
- **Cum Laude Society:** Awarded to the top 20% of the graduating class for maintaining a top-tier GPA through a rigorous academic schedule, while consistently demonstrating the organization's core values of personal integrity, community justice, and scholarly excellence.

EXPERIENCE

Hudson Way Capital Management | Dallas, TX

June 2024 – July 2024

Business & Technology Intern

- Conducted an in-depth fundamental and financial analysis of a publicly traded quick-service restaurant company, evaluating historical earnings, margin trends, cost structure and recent operating performance to assess risk and sustainability for a potential acquisition.
- Created an investment memo synthesizing income statement trends and profitability deterioration ultimately concluding that declining margins and recent losses made the company an unattractive investment relative to Hudson Way Capital Management's risk-return criteria.

Make a Play Foundation (MAP) x UBS | Remote

June 2026 – Present

Investment Banking Summer Fellow

- Selected as 1 of 100 NCAA athletes nationwide for MAP's UBS-sponsored Money Ball Fellowship in investment banking and private equity.
- Participated in a live P/E case competition analyzing a European consumer technology acquisition opportunity, Quantexa, for a U.S. investor.
- Completed mock interviews with Make a Play alumni acting as firm representatives, developing technical expertise and interview readiness.

Qualex-Landmark™ | Vancouver, CA

June 2026 - July 2026

AI Technology & Innovation Intern

- Built an AI agent that automatically scraped targeted real estate websites weekly, compiled listings matching specific location and property criteria, and generated a formatted report distributed to development and marketing teams every Monday, eliminating manual research time.
- Researched and evaluated 4 electronic lock companies over one month, including product testing and interviews with property managers using each system, then presented comparative findings to company senior leadership to evaluate the need for new technologies within properties.
- Authored a 10-page formal proposal to the City of Vancouver advocating for reduced minimum bike parking requirements, backed by a cross-Canada comparative analysis, property-level bike locker audits, and interviews with property managers on tenant storage usage trends.

LEADERSHIP & COMMUNITY DEVELOPMENT

Brown Women's Crew | Providence, RI

September 2025 – Present

Student-Athlete, Ivy League Division I Rowing

- Committed 30+ hours per week to structured training, competition, travel and team obligations while successfully balancing a full academic course load, demonstrating strong time management, discipline, and accountability across multiple high-demand responsibilities.
- Performed consistently under high-pressure competitive conditions, requiring rapid decision-making, mental resilience, and sustained focus while adapting to circumstances and feedback, in individual and team-based performance settings over extended periods of time.
- Contributed to team cohesion and performance through communication and preparation, supporting team objectives and environment.

Brown Women's Crew Buddy Program | Providence, RI

June 2026 - Present

Student-Athlete Mentor, Ivy League Division I Rowing

- Selected to mentor an incoming freshman, guiding their transition into collegiate athletics and easing the adjustment to Division I training demands, while serving as an ongoing support system for balancing athletics with academic responsibilities throughout the year.

Brown Investment Group | Providence, RI

September 2025 – Present

General Body Member

- Contributed to Brown's premier student-run investment fund, founded in 1987, the Brown Investment Group is the oldest and largest investment organization on campus, focused on teaching and practicing the principles of investing through hands-on portfolio management.
- Decided on investments driven by a structured pitch process in which terms present analyses of companies to the general body. After each presentation, members question the thesis, evaluate the risks, and vote on whether the company meets the fund's investment criteria.

The Episcopal School of Dallas Women's Crew | Dallas, TX

September 2022 - May 2025

Team Captain

- Served as team captain for two consecutive years, leading day-to-day team operations, fostering a supportive and collaborative training environment, and partnering with the coaching staff to design and implement training plans tailored to the team's goals and skill levels.
- Led my boat to a Regional Championship title senior year, advancing to Youth Nationals and placing 3rd in the time trial.

INTERESTS & SKILLS

Rowing | Sports Medicine | Zoroastrian | Fluent Farsi | LSU football | Skiing

NISHA MUSUNURI

Chicago, IL | (847) 530-2857 | nmusunur@andrew.cmu.edu | LinkedIn

EDUCATION

Carnegie Mellon University, Tepper School of Business | May 2029

Cumulative GPA: 3.88/4.00

Bachelor of Business Administration

SAT: 1580

Relevant Coursework: Accounting, Macroeconomics, Microeconomics, Business Computing

Honors & Awards: Dean's List (2025-26), AP Scholar with Distinction, Jalen Brunson Scholarship Recipient

PROFESSIONAL & RELEVANT EXPERIENCE

Heritage Clay Partners | Chicago, IL

April 2026 – August 2026

Search Fund Analyst

- Screened and evaluated 50+ Confidential Information Memoranda across diverse B2B industries for a single-operator search fund, presenting investment recommendations to the principal and building simplified LBO models to solve for purchase price/structure that would achieve a targeted 35% IRR and a 3.5x net MOIC
- Drafted Indications of Interest (IOI) incorporating seller's note and earnout components for select acquisition targets, and led end-to-end financial due diligence on a \$9.6M-revenue Maryland healthcare services company, including independent analysis of a third-party Quality of Earnings report to help inform final valuation
- Partnered directly with the fund's principal from initial screening through valuation, diligence, and LOI submission, gaining full-cycle M&A exposure across sourcing, structuring, and deal execution

Morgan Stanley | Chicago, IL

March 2026 – Present

MAP Investment Banking Fellow

- Selected as 1 of 75 NCAA athletes to lead the Monitoring Phase for a five-member deal team evaluating Heidi Health, an AI-powered clinical documentation and workflow automation platform, synthesizing healthcare AI research, financial performance, and enterprise adoption trends into a final investment recommendation
- Evaluated four key investment drivers supporting Heidi's AI workflow platform, analyzing expansion across 116 countries, 128% YoY revenue growth, and enterprise adoption to assess scalability and market positioning
- Assessed Heidi's financial profile and strategic fit within healthcare automation, analyzing margin improvement from -50% to -10%, enterprise validation, and cross-sell opportunities to support a final "Go" recommendation

Women In Business | Pittsburgh, PA

December 2025 – Present

Member

- Participated in professional development workshops focused on finance and career readiness, building a stronger understanding of financial markets and industry trends while developing skills for business and finance careers
- Engaged with industry professionals and alumni through speaker events and small group discussions, learning about current business and market trends and gaining insight into different career paths in finance

LEADERSHIP AND EXTRACURRICULARS

Carnegie Mellon Varsity Basketball | Pittsburgh, PA

August 2025 – Present

Student-Athlete

- Strengthened time-management and organizational skills through balancing a 30-hours per week varsity athletic commitment with full-time coursework and leadership in extracurricular activities across campus
- Developed a team-first, feedback-oriented attitude through consistently incorporating coaching feedback and working collaboratively with teammates to achieve collective performance goals in high-pressure environments
- Served as representative leading recruitment efforts, campus visits, one-on-one conversations, and class shadowing

Financial Analyst Student Training (FAST) | Pittsburgh, PA

May 2026 – Present

Marketing & Digital Communications Director

- Directed FAST's digital media strategy across the website, LinkedIn, and social media platforms, executing marketing initiatives to expand campus visibility, strengthen brand recognition, and drive member recruitment
- Supported member recruitment and onboarding by answering questions from prospective and incoming members, sharing information about the organization, and helping new members transition into FAST

SKILLS & INTERESTS

Skills: Microsoft Excel, Financial Modeling, DCF Valuation, Comparable Company Analysis

Certifications & Training: Financial Analyst Student Training (FAST), Seal of Biliteracy (Spanish)

Interests: Playing Acoustic Drums, Meal Prepping, Sneaker Reselling, Playing Tennis, Strength Training

Olivia Migyu Kim

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EDUCATION

Harvard University

A.B. in Economics

Cambridge, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.96/4.0 | **SAT:** 1580
- **Honors/Awards:** Phillips Academy Athletics Phelps Award (2025), AP Scholar with Honor (2024), Phillips Academy Keyes Award (2023), Phillips Academy Webster Prize (2023), US Squash Scholar Athlete Award (2021–2023)
- **Relevant Courses:** Principles of Economics, Wall Street Prep Accounting & Financial Statement Analysis

PROFESSIONAL EXPERIENCE

Providence Equity Partners

Sourcing Analyst Intern

Boston, MA

Jun 2026 – Present

- Spearhead research on emerging investment theme platforms and build comprehensive sourcing pipelines of 40-50+ companies in Excel and PowerPoint, evaluating market size, competitive dynamics, and growth drivers to identify new investment opportunities
- Gain hands-on exposure to investment theses, decision-making, and industry trends across \$100M+ deals by supporting notetaking during management meetings, board meetings, and executive summits alongside senior investment professionals and company leaders

Morgan Stanley

MAP Investment Banking Fellow; Team Captain

Remote

Mar 2026 – Jul 2026

Selected Transaction Experience

- Command Zero — *Agentic AI Security Operations Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1/9 captains from 376 NCAA athletes (top 2%) to lead a 5-person deal team through 6 weekly workstreams, evaluating software/AI-driven acquisition targets for a prospective PE client and ultimately delivering a live investment recommendation
 - Sized Command Zero's opportunity using ~\$6.31T IT TAM, ~\$1.15T AI/software SAM and ~\$45B SOM while assessing positioning against key competitors, grounding the investment thesis in scalable adoption and differentiated capabilities

Junova, Inc.

Marketing & Operations Intern

Remote

Sep 2025 – Jun 2026

- Led marketing initiatives for a travel AI startup featured in The Points Guy, CNN, and The Wall Street Journal by managing an affiliate network and social media accounts that expanded customer reach and contributed to Junova's growth to 7,900+ users
- Contributed insights in weekly strategy meetings that informed product and brand decisions supporting 1,500+ customer savings cases and \$9.5K in net revenue growth, building hands-on experience in early-stage growth execution and strategy for a fast-scaling startup

Into Prep

Teaching Assistant

Paoli, PA

Jun 2025 – Aug 2025

- Proctored practice SAT exams, graded assignments and tracked performance data for 200+ students, creating organized feedback loops that supported measurable improvement, stronger accountability and more efficient classroom operations across the summer
- Cultivated a positive learning environment through collaboration with 20+ staff members and tailored student guidance, helping learners build confidence, improve test readiness and stay engaged across fast-paced academic sessions with diverse skill levels

Harvard Business School

Research Assistant

Remote

Oct 2024 – Jun 2025

- Conducted in-depth research on Tesla's corporate timeline, financial performance, controversies and strategy under faculty mentorship, synthesizing findings from 20+ sources that strengthened understanding of corporate governance in dynamic industries
- Performed financial and accounting analysis using SEC filings, 10-Q reports and industry articles, co-authoring an unpublished case study on Tesla's vehicle service accounting treatment that improved technical fluency/business writing skills through applied research

LEADERSHIP & COMMUNITY DEVELOPMENT

Harvard University Varsity Women's Squash Team

NCAA Division 1 Student-Athlete

Cambridge, MA

Sep 2025 – Present

- Earned a walk-on spot through Harvard's rigorous Division I tryout process for its top-ranked Varsity Women's Squash team, demonstrating resilience, competitive skill and composure that secured a place within an elite collegiate program environment
- Balance elite-level training, academics and extracurricular commitments while organizing team dinners and supporting teammates through practices and matches, strengthening trust, morale and culture within a high-performing squad across the academic year

Harvard Undergraduate Venture Capital Group (HUVCG)

Associate Director of Strategy

Cambridge, MA

Jun 2026 – Present

- Lead fundraising strategy for VCG's organizational growth, partnering with fellow leadership members on sponsorship outreach and in-depth structural planning for campus events and VCG's Annual Entrepreneurship Summit, Harvard's flagship venture capital conference

Analyst

Sep 2025 – Jun 2026

- Identified investment opportunities through cold outreach, founder meetings and due diligence across pitch decks and industry trends, presenting findings to an internal committee that supports formal investment memos shared with partner venture capital firms

NON-TECHNICAL SKILLS & INTERESTS

Skills: Market Research & Competitive Analysis, Marketing Campaign Development, Team Culture Development, Collaboration

Languages: Proficient Spanish, Conversational Korean

Interests: Running, culinary exploration, driving, crime podcasts

Owethu Makhanya

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EDUCATION

University of Massachusetts - Amherst

Amherst, MA

Isenberg School of Management

GPA: 3.8/4.0

Bachelor of Business Administration in Finance

Candidate, December 2028

Additional Major in Managerial Economics

- John & Abigail Adams Scholar \$56K granted for all 4 years
- Deans List (3 semesters)

WORK EXPERIENCE

Citi Bank Mentee

New York, NY

D1 Student Athlete Development Program

June 2026 - August 2026

- Engaged in workshops focused on technical skills such as accounting and financial statement analysis
- Throughout the 3 month period participated in behavioral and technical mock interviews with Citi mentors
- Understood more of the relationships and mechanics of the bank and how they operated in relation together

Morgan Stanley

Remote

Make A Play Program Investments Banking Fellowship and Pitch Competition

March 2026 - Present

- Selected among NCAA athletes (<5% admission rate) to participate in finance program for student athletes
- Pitched an AI-healthcare private company to Morgan Stanley employees as an acquisition after 6 weeks of deliverables and research

Ashburton Investments

Johannesburg, SA

Summer Asset Management Intern

May 2026 - June 2026

- Evaluated Ashburton's trading instruments and analyzed their correlation with South African interest rates
- Observed 10+ trading-floor meetings alongside portfolio managers and analysts across departments
- Gained exposure to capital allocation and investment decisions through mentorship and meeting observations

Integrus Partners

Dallas, TX

Spring Healthcare & Residential Services M&A Intern

April 2026 - May 2026

- Researched and sourced data on commercial landscaping companies to build a pipeline of sell-side targets
- Progressed to tire - pipeline companies that extended to multiple regions within the US at a time
- Worked weekly on receiving deliverables on verifying targets to meet inclined expectations over 500+ places

LEADERSHIP & EXTRACURRICULAR

UMass Investment Banking Group

Amherst, MA

Junior Analyst

February 2026 - Present

- Attended weekly meetings to discuss three-statement modelling, valuation methods and market updates
- Understood the investment banking recruiting process earlier and further knowledge of the finance industry

Black Student Athlete United

Amherst, MA

Vice President

February 2025 - Present

- Advised as 1 of 6 representatives to advocate for 500 + student-athletes of colour across UMass Athletics
- Facilitated and organized events for student athletes to foster inclusion across campus and engagement

Division 1 Varsity Tennis

Amherst, MA

Student Athlete

January 2025 - Present

- Won ITA - All Academic Honours as the highest GPA among all 21+ varsity sports and individually
- Drafted to the 6-week Leadership Academy from UMass varsity sports to support the future team captains

Smart Woman Securities

Amherst, MA

Stock Pitch Competitor and Member

October 2025 - Present

- Attend weekly meetings engaging in professional development opportunities for women within finance
- Analyzed with a 5 person team on a 10 week equity pitch research project within the consumer retail industry

INTERESTS

Interests: Pickleball, Padel, Plant-based Cooking, New York Times Games, and Travelling (7+ countries)

Relevant Programs : Roark Capital Wall Street Club Cohort and Wall Street Prep Certification

Peyton G. Phillips

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EDUCATION

University of Pennsylvania | College of Arts and Sciences

Philadelphia, PA

Bachelor of CAS in Philosophy, Politics, and Economics (PPE) | Minor in Consumer Psychology in Wharton

Expected Graduation: May 2029

- **Cumulative GPA:** 3.89/4.0
- **Honors/Awards:** NCAA Division I Student Athlete (Lacrosse), Academic All-American (2025)
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)
- **Organizations:** Build a Boss | Netter Center for Community Partnerships | Penn Athletics Wharton Leadership Academy

PROFESSIONAL EXPERIENCE

UBS

Remote

MAP Investment Banking Fellow & Team Captain

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Celonis — AI-Powered Process Intelligence & Optimization Platform (Technology M&A / Capital Markets & Strategic Advisory Simulation)
 - Selected as 1/12 NCAA athletes from 594 participants (top 2.0%) to lead a 5-person deal team as Captain through 6 weekly workstreams, presenting Celonis as a European AI-powered process intelligence acquisition target live to UBS on Monday, 8/17
 - Analyze Celonis' \$2.13B global process mining TAM, \$658.6M European SAM and 3 high-growth software subsectors using 7 reputable sources, evaluating AI adoption, SaaS delivery + implementation risks to shape the market framing/downstream work
 - Synthesize Celonis' ~\$13B valuation, ~\$1B+ revenue scale, 47.4% market share and 3-peer comp set into a 12-page pitch book, applying 20+ hours of Wall Street Prep accounting coursework to strengthen diligence work and support the team's final thesis

Netter Center for Community Partnerships | Community Engagement & Civic Programs

Philadelphia, PA

Penn Leads the Vote Athletics Coordinator

Aug 2025 – Present

- Design and deliver youth development programming across 3 schools serving Grades 3–9 by leading interactive health, career, and leadership activities while mentoring young students, strengthening their engagement, confidence & long-term personal development
- Coordinated civic engagement initiatives across Penn Athletics by partnering with coaches, staff, and 200+ student-athletes to launch All Vote No Play Day, facilitate voter registration, and streamline ballot access, strengthening campus participation through outreach

Long Island Yellow Jackets

New York, NY

Lacrosse Coach (Seasonal)

Jun 2023 – Present

- Coach athletes on the nation's #1 girls' lacrosse team by developing individualized instruction, practice plans, and competitive strategies, strengthening technical development, teamwork, high-performance execution, competitive confidence, and tactical discipline
- Mentor aspiring collegiate athletes by designing recruiting guidance, skill development plans, and competitive preparation, helping 20+ players strengthen their recruiting profile/s while advancing long-term athletic, academic, and leadership success in college and beyond

Meg Show Podcast

New York, NY

Intern

Feb 2025 – May 2025

- Researched NCAA women's lacrosse trends by analyzing 5+ games weekly, identifying standout athletes, statistical patterns, and storylines that strengthened episode quality, engagement, editorial accuracy, and content relevance through data-driven sports content
- Developed podcast scripts using player statistics, game analysis, and research findings from 5+ weekly games to communicate complex information through engaging storytelling, improving content accuracy, production efficiency, listener understanding/overall retention

LEADERSHIP & COMMUNITY DEVELOPMENT

Penn | Varsity Women's Lacrosse | [News](#)

Philadelphia, PA

NCAA Division I Student-Athlete

Sep 2025 – Present

- Commit 20+ hours weekly to NCAA Division I lacrosse through practices, film study, strength training, and competition while building upon an award-winning high school career, strengthening resilience, time management, and high-performance under pressure

Student Athlete Invest Club

Philadelphia, PA

External Events Committee Member

Sep 2025 – Present

- Coordinate finance networking initiatives by partnering with alumni, firms, and student leaders to organize speaker events and career panels, expanding professional access while strengthening finance education and member engagement across the organization

Build a Boss

Philadelphia, PA

Mentor

Sep 2025 – Present

- Mentor high school girls in Philadelphia through workshops on leadership, conflict resolution, employment readiness, and personal development, strengthening their confidence, communication, and decision-making skills for future academic and professional success

Penn Business & Investment Organizations

Philadelphia, PA

Penn Athletics Wharton Leadership Academy & Young Quakers Community Athletic (YQCA) Member

Sep 2025 – Present

- Develop leadership and communication skills through professional workshops while collaborating with 30+ student-athletes and industry professionals, strengthening organizational leadership, strategic decision-making & long-term prep for my post-playing career
- Mentor 20+ K–8 students through weekly after-school programming in West Philadelphia, fostering meaningful relationships, leadership & personal development while creating a consistent, supportive environment that strengthened youth engagement and impact

NON-TECHNICAL SKILLS & INTERESTS

Interests: Fitness | Looking for clovers | Journaling

Rayna Li

raynali@mit.edu | +1 (214) 714-1898 | linkedin.com/in/rayna-li

EDUCATION

Massachusetts Institute of Technology

Bachelor of Science in Computer Science & Economics | Minor in Finance

Cambridge, MA

Expected: May 2029

- Cumulative GPA: 4.9/5.0 | SAT: 1550
- Relevant Courses: Math for Computer Science, Python Programming & Computational Thinking, Financial Accounting, Microeconomics, Startups & Entrepreneurship (Enrolled Fall 2026: Managerial Finance, Algorithms, Linear Algebra w/ Optimization)

PROFESSIONAL EXPERIENCE

Intel

Santa Clara, CA

AI/ML Engineering Intern

May 2026 – Aug 2026

- Owned the end-to-end machine learning training workflow for an object detection AI model identifying CPU “ghosting” defects: performed data cleaning, sorting, and training set creation; developed Python scripts to run model inference; and conducted iterative post-run analysis to refine performance, delivering an estimated incremental \$50,000 annually in fraud-related cost avoidance
- Applied SQL to analyze 10,000+ CPU images and engineered a fine-tuned OCR model for returns-fraud detection across Windows and Linux development environments, improving accuracy from 84.9% to 95.7% and reducing manual inspection time by 150 hours annually
- Built a Python-based benchmarking tool comparing accuracy and latency across open-source OCR models and proprietary APIs, equipping operations leadership with a data-driven framework for AI vendor selection

Bank of America

Remote

Make a Play (MAP) Foundation Investment Banking Fellow

Jan 2026 – Present

- Built a buy-side investment thesis and financial forecasting model for a healthcare-sector acquisition target projecting 35% revenue CAGR, conducting peer valuation benchmarking and sensitivity analysis as part of a 5-person team that ranked 1st out of 654 fellows
- Selected for the Pro Bowl Games (top 1% of 654 fellows) after a 5-month technical bootcamp in quantitative analysis, strategic problem-solving, and executive-level presentation skills

MIT Department of Political Science

Cambridge, MA

Undergraduate Research Assistant

Jan 2026 – Feb 2026

- Developed Python-based predictive algorithms to analyze parcel-level GIS data across 100+ Boston-area municipalities, modeling housing transformation drivers and producing spatial visualizations that informed economic research on zoning policy trends

Collins Permian

Dallas, TX

AI Intern

May 2025 – Aug 2025

- Designed an OCR + LLM-powered workflow to extract historical return data from investment decks, automating data ingestion and increasing internal analytics processing speed by 80%
- Conducted an internal consulting-style analysis evaluating 13 AI automation platforms on cost, integration feasibility, and operational impact, presenting recommendations to the executive team and securing buy-in for enterprise-wide adoption of AI-driven workflows

Dallas Environmental Education Initiative (EEI), City of Dallas, University of North Texas

Dallas, TX

Research Intern

Jun 2024 – Aug 2024

- Selected as 1 of 10 interns from 100+ applicants to research Dallas water systems, performing spatial and statistical analysis using ArcGIS and R, and presenting findings and policy recommendations to Dallas City Council members for potential integration

LEADERSHIP & COMMUNITY DEVELOPMENT

MIT Varsity Women's Tennis

Cambridge, MA

NCAA Division III Student-Athlete

Sep 2025 – Present

- Compete as a varsity tennis student-athlete while managing 15+ hours of weekly training alongside a rigorous academic schedule
- Recipient of the 2025 USTA Texas Sportsmanship Award and previously ranked Top 20 in the U.S. for high school tennis by UTR

MIT Asian American Association

Cambridge, MA

Internal Social Chair

Sep 2025 – Present

- Plan and execute 3–5 internal events per semester coordinating logistics, scheduling, budgeting, and cross-team communications to strengthen member engagement and team cohesion

MIT Society of Women Engineers (SWE)

Cambridge, MA

Campus Representative

Sep 2025 – Jan 2026

- Coordinate logistics and execution for monthly SWE events serving 500+ members, partnering with committee leadership on space reservation, online coordination, and promotion to strengthen academic and community engagement across MIT's SWE chapter

ACEing Autism

Dallas, TX

Court Lead & Social Media Director

Jan 2019 – Aug 2025

- Led weekly tennis clinics for athletes with autism while managing outreach across 8 social media platforms, distributing reminders and marketing materials that expanded participation and strengthened community engagement across multiple program locations

SKILLS & INTERESTS

Skills: Python, SQL, R, Excel, Java, Claude Code, Prompt Engineering | **Interests:** Pickleball, Road Trips, Physical AI, Food Crawls (Beli)

Languages: English (fluent), Mandarin (fluent) | **Programs:** Sigma Kappa Sorority – Sisterhood Chair

RENEE BAK

856-834-0102 | Mount Laurel, NJ | rbak1@jh.edu | [LinkedIn](#)

EDUCATION

Johns Hopkins University, Krieger School of Arts & Sciences

B.A. Economics | Minor in Applied Math & Statistics

Expected May 2029

Cumulative GPA: 3.61/4.00

Honors & Awards: Dean's List Spring 2026, CSCAA Scholar All-American First Team

Organizations: Alpha Kappa Psi Business Fraternity, Women in Business, Alpha Phi Sorority

Relevant Coursework: Elements of Macro/Microeconomics, Financial Accounting, Financial Markets & Institutions, Corporate Finance, Identifying & Capturing Markets, Wall Street Prep Accounting & Financial Analysis

PROFESSIONAL EXPERIENCE

iink Payments

Remote

Financial Planning & Analysis Intern

Jul 2026 - Present

- Built and automated a recurring FP&A reporting pack for the CFO, covering monthly and quarterly P&L (actual vs. plan vs. prior year) with detailed variance analysis and an opex breakdown by category, enabling the finance team to generate quick, accurate reports for board presentations and custom analysis
- Collaborated with the CFO on a weekly basis to review and refine deliverables, sharpening attention to detail and troubleshooting skills while gaining corporate finance insights

Morgan Stanley

Remote

Make A Play Investment Banking Fellow

Mar 2026 - Jul 2026

- Directed the Planning Phase for a Morgan Stanley case study as 1 of 75 selected NCAA athletes (~20%), assessing Databricks across 5+ financial inputs tied to AI deployment and cloud infrastructure scalability
- Constructed 4+ strategic exhibits and led 5 diligence workstreams (revenue concentration, IPO readiness, margin sustainability) for a 5-person deal team, surfacing risk factors and testing investment assumptions

Ronald McDonald House Philadelphia

Philadelphia, PA

Development Intern

May 2026 - Aug 2026

- Solicited and secured 16 auction items totaling over \$3,500 in fair market value for the Hit 'Em for the House golf event supporting families on their children's medical journeys, managing listings through GiveSmart
- Conducted due diligence on prospective corporate partners, compiling 50 company profile documents to identify partnership opportunities aligned with organizational priorities
- Organized 240+ donor brick photographs in SharePoint, mapping each brick's location and inscription using Visio to create a searchable reference system for donor and family inquiries
- Supported donor/volunteer engagement through house tours, thank-you calls, and attending events on behalf of RMH

Typa (YC S24)

Baltimore, MD

Consultant, Go-to-Market & Customer Acquisition

Feb 2026 - Apr 2026

- Recruited to a 4-person consulting team supporting a Y-Combinator-backed AI SaaS startup, developing go-to-market and customer acquisition strategies for mid-market B2B software customers
- Built an outbound pipeline targeting 25 Heads of Content at B2B SaaS companies, researching and qualifying prospects using a custom scoring rubric to prioritize high-fit leads and support scalable customer acquisition

EXTRACURRICULAR AND LEADERSHIP EXPERIENCE

Johns Hopkins Swimming

Baltimore, MD

NCAA DIII Varsity Athlete

Aug 2025 - Present

- Recruited as the top-ranked woman in the class, earning NCAA DIII All-American honors as a freshman
- Committed 25+ hours per week to training and competition while maintaining rigorous academic workload

Johns Hopkins Alumni Association

Baltimore, MD

Alumni Student Ambassador

Apr 2026 - Present

- Selected as one of a diverse group of student leaders to serve as Alumni Student Ambassador, representing the student voice to alumni, trustees, and university administration
- Engaged alumni and donors at campus and regional events (Commencement, Reunion Weekend, Baltimore Chapter events), sharing student perspectives and strengthening university-alumni relationships

SKILLS & INTERESTS

Skills: Financial Modeling, Excel, Data Analysis, Aleph (FP&A), Campfire (ERP/GL), GiveSmart, Raiser's Edge

Interests: Dogs (Samoyed & Shih-Tzu), Harry Potter, Marvel, trying new cafes and restaurants, cooking shows, skiing

Ronald J. Gualario

25 Holmesbrook Rd, Basking Ridge, NJ 07920 | rgualario29@amherst.edu | (908) 432-6544 | [LinkedIn](#)

EDUCATION

Amherst College, Amherst, MA | *Bachelor of Arts in Economics*

Expected May 2029

- GPA: **3.96/4.0**
- Relevant Coursework: Economics, Calculus, Rule of Law, Statistics, Money and Banking
- Organizations: NCAA Men's Varsity Tennis, Investment Club, Athletics x Sustainability Rep, 180 Degrees Consulting Club
- Supplemental Industry Education: Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

Ridge High School, Basking Ridge, NJ | *High School Diploma*

June 2024

- GPA: **4.31/4.0**
- Men's Varsity Tennis (Four year member/Two year captain), National Honors Society
- New Jersey State Singles Championship and New Jersey Player of the Year (2024)

WORK AND INDUSTRY EXPERIENCE

UBS, Remote | *MAP Investment Banking Fellow*

Jun 2026 – Present

Selected Transaction Experience

- **SAP** — *Enterprise Cloud & Business AI Platform (Tech M&A / Strategic Advisory Simulation)*
 - Selected as 1 of 12 NCAA athletes (top 2.0% of 594) to lead the Planning Phase of a UBS banking case, structuring 5+ market trends and diligence priorities
 - Analyzed SAP's €21.9B cloud backlog, €4.2B net cash, and 4 enterprise AI trends across 5+ sources to assess demand drivers, positioning, and risks
 - Built planning models from SAP's 30.8% LTM EBITDA margin, €8.24B free cash flow, and FY2026 guidance to set valuation assumptions

Springdale Industries, New York, NY | *Private Equity Summer Analyst Intern*

Jun 2026 – Aug 2026

- Conducted market and industry research on prospective acquisition targets for Greenwood Advisors, the firm's M&A platform, assessing competitive positioning, growth drivers, and sector trends to inform investment theses
- Built and maintained financial models to evaluate potential acquisitions, analyzing valuation, returns, and deal structure across multiple transaction scenarios
- Prepared research summaries and materials on target companies, synthesizing financial and operational data to support the deal team's sourcing and evaluation decisions
- Attended meetings and calls with potential acquisition targets, contributing to relationship-building and evaluation across the M&A pipeline

Orange Lawn Tennis Club, South Orange, NJ | *Tennis Coach*

May 2025 – Aug 2025

- Coached 30+ junior and adult players in technique, match strategy, and footwork through private and group sessions
- Designed custom lesson plans for 20+ athletes, delivering individualized instruction that accelerated skill development

VOLUNTEER WORK

WITH GRACE Initiative, Gillette, NJ | *Operations & Volunteer Assistant*

Sep 2021 – Jun 2024

- Coordinated logistics, scheduling, and volunteers for 10+ community drives and fundraising events, expanding outreach and local impact
- Managed financial records, receipts, and donor contributions across 5+ initiatives, improving documentation and transparency

SKILLS AND INTERESTS

Skills: Excel, PowerPoint, Financial Modeling, RStudio, and Italian (Intermediate)

Interests: Pickleball, Golf, Boxing, Chess, and Traveling

Ruhika Bhat

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EDUCATION

Georgetown University

Bachelor of Science in Business Administration | Minor in Computer Science

Washington, DC

Expected Graduation: May 2029

- **Cumulative GPA:** 3.77/4.0 | **SAT:** 1500
- **Honors:** Washington Post All-Met Player of the Year (Tennis, Spring 2025), High School All-American (Tennis, Spring 2025)
- **Relevant Coursework:** Financial Accounting, Management and Organizational Behavior, Computational Business Modeling, Business Administration Seminar: Psychology at Work, Microeconomics, Macroeconomics, Computer Science I & II
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 09/2026)

PROFESSIONAL EXPERIENCE

Make-A-Play Foundation

Investment Banking Fellow

Remote

Jun 2026 – Present

- Synthesia — *AI-Powered Enterprise Video & Content Generation Platform (Technology M&A / Capital Markets & Strategic Advisory Simulation)*
 - Selected as 1/12 NCAA athletes out of 594 (top 2.0%) to lead the Monitoring Phase for a deal team of 5, evaluating Synthesia's strategic fit/long-term value creation for live presentation to UBS Directors
 - Recommended a GO investment in Synthesia, evaluating 4 value-creation drivers across enterprise AI exposure, SaaS growth, and product expansion while highlighting 90% Fortune 100 penetration, 140%+ net revenue retention + \$200M 2026E revenue
 - Assessed long-term value creation and exit pathways, linking Synthesia's expansion from AI video into enterprise learning with international growth and product innovation while evaluating a 20.0x 2026E revenue multiple and potential IPO/exit outcomes

Private Tennis Instruction

Independent Tennis Coach

Boyds, MD

Jun 2025 – Present

- Designed 10+ individualized training plans by evaluating player skill levels, performance and long-term goals, tailoring technical drills and match strategy to strengthen stroke development, and on-court decision-making with young athletes with varying experience levels
- Managed 3 core coaching responsibilities spanning scheduling, lesson coordination and payment tracking while delivering clear, actionable feedback to athletes and maintaining professional communication with players/families to support consistent development

Georgia Institute of Technology

Machine Learning Summer Intern

Remote

Jun 2024 – Aug 2024

- Developed 1 machine learning model in Python to predict water potability using structured datasets, applying data preprocessing, feature selection + predictive modeling techniques while conducting iterative testing to improve the trustworthiness of model outputs
- Conducted 3 months of machine learning research under a Georgia Tech faculty researcher, tracking and visualizing model performance across successive experimental trials while synthesizing key trends and model improvements into an extensive final report

LEADERSHIP & COMMUNITY DEVELOPMENT

Scholars of Finance

Leadership Development Program Participant

Washington, DC

Jan 2026 – Present

- Completing a structured Leadership Development Program focused on ethical leadership, professional communication and relationship building, engaging with finance professionals through workshops and discussions to strengthen technical skills for finance
- Exploring 4 professional pathways across investment banking, consulting, asset management and corporate finance through industry sessions, collaborating with peers to strengthen networking/communication skills, while developing a deeper understanding of finance

Georgetown University Division I Women's Tennis

NCAA Division I Varsity Student-Athlete

Washington, DC

Aug 2025 – Present

- Commit 20+ hours weekly to Division I practices, conditioning, competition and team travel while maintaining a rigorous academic schedule, demonstrating the discipline, resilience & time management required to perform well and balance strong academics/athletics
- Collaborate with 10+ teammates and coaching staff across practices and competitive matches, adapting to diverse communication styles while applying strategic thinking and composure under pressure to strengthen team cohesion, support shared performance goals

Georgetown Athletes Invest

General Member

Washington, DC

Feb 2026 – May 2026

- Participated in 5+ workshops and informational sessions focused on technical finance concepts, professional expectations and recruiting preparation, strengthening knowledge of industry terminology and analytical frameworks while gaining practical exposure

Georgetown Hoyalitics

Analyst Training Program Participant | Data Scientist

Washington, DC

Jan 2026 – Apr 2026

- Completed an analyst training program focused on data-driven problem solving, analytical thinking and professional communication, applying structured frameworks through workshops and collaborative exercises to further develop my quantitative and qualitative skills
- Served as 1 data scientist on a team-based consulting project, interpreting datasets and translating analytical findings into strategic recommendations and client-focused deliverables while collaborating with peers to strengthen critical thinking + problem-solving skills

NON-TECHNICAL SKILLS & INTERESTS

Skills: Time Management, Teamwork, Adaptability, Problem Solving, Communication

Interests: Baking, Reading, Hiking, National Parks, NYT Mini Games, Indian Classical Dance

Programs: Python (NumPy, pandas, scikit-learn), Java, C++, Microsoft Office (Excel, PowerPoint, Word)

Ryan B. Jorgensen

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EDUCATION

Brown University

Providence, RI

Bachelor of Science in Applied Mathematics-Economics

Expected Graduation: May 2029

- Cumulative GPA: 4.0/4.0
- Relevant Coursework: Intermediate Macroeconomics, Intermediate Microeconomics, Multivariable Calculus, Linear Algebra
- Serve as an active member of Bruno Cares Peer-to-Peer Support Group, a student-athlete mental health support group meeting bi-monthly (Jan 2026 – Present)
- Finance Certification: Wall Street Prep, Accounting & Financial Statement Analysis (completed September 2026)

PROFESSIONAL EXPERIENCE

UBS

Remote

MAP Investment Banking Fellow

Jun 2026 – Sep 2026

Selected Transaction Experience

Celonis, AI-powered process intelligence platform (technology M&A and capital markets advisory simulation)

- Selected as 1 of 12 NCAA athletes out of 594 applicants (top 2%) to lead the execution phase for a 5-person deal team, building the valuation and transaction analysis presented to UBS directors
- Analyzed two precedent transactions ranging from \$2.4B to \$2.9B in deal value and 2.7x to over 20.0x revenue, comparing Software AG and Moveworks to assess how AI differentiation drives valuation premiums
- Built a valuation framework using a 12x to 18x exit EV/EBITDA range and peer comparables from UiPath, Appian, and Datadog to stress-test Celonis' growth outlook and support the team's final recommendation

Red and White Fleet

San Francisco, CA

Sales Associate

Jul 2026 – Aug 2026

- Worked part-time as a customer-facing sales associate for a high-volume Bay cruise operator, engaging 250+ customers daily while managing boarding, ticketing, and turnaround logistics
- Ranked among the team's top ticket sellers by proactively upselling cruise packages to walk-up customers, sharpening a direct, persuasive sales approach in a fast-paced environment

LEADERSHIP & ATHLETIC ACHIEVEMENT

Brown University Men's Varsity Crew

Providence, RI

NCAA Division I Student-Athlete

Sep 2025 – Present

- Balance 20+ hours weekly of training, competition, and travel with a rigorous academic workload, building discipline and performance under pressure
- Collaborate with 40+ teammates annually to sustain a high-performance training culture across a demanding competitive season

USRowing

Chula Vista, CA

Athlete, U19 World Rowing Championships

Jun 2024 – Aug 2024

- Earned a bronze medal at the U19 World Rowing Championships in St. Catharines, Canada, competing against roughly 30 elite junior athletes while representing the United States internationally
- Committed 30+ hours weekly to training, recovery, and performance analysis while competing under elite international pressure

Marin Rowing Association

Larkspur, CA

Athlete & Team Captain

Feb 2021 – Jun 2025

- Competed as a four-year athlete and three-year varsity member on a top-5 nationally ranked club, contributing to podium finishes at regional, national, and international regattas
- Led a squad of 50+ athletes as team captain during the 2024–2025 season, coordinating logistics and reinforcing accountability standards that strengthened team cohesion and race-day performance

SKILLS, ACTIVITIES & INTERESTS

Languages: English (native), Spanish (conversational)

Interests: Architectural 3D modeling, photography, hiking, spaceflight

Sienna J. Wiggins

Mobile: +1 (646) 951-6588 | New York, NY | wiggins4@sas.upenn.edu | [Linkedin.com/in/sienna-wiggins/](https://www.linkedin.com/in/sienna-wiggins/)

EDUCATION

University of Pennsylvania

Bachelor of Arts in Economics

Philadelphia, PA

Expected Graduation: May 2029

- **Relevant Coursework:** Microeconomics, Macroeconomics, Calculus II, Accounting, Corporate Finance (Spring 2027)
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)
- **Organizations:** Wharton Investment & Trading Group (WITG) Accelerator Program, Penn Athletic Wharton Leadership Academy (PAWLA), Women's Athletic Association (WAA), Natives at Penn (NAP), Wharton Women Catalyst Program

UPenn Women's Varsity Swim Team

NCAA Division 1 Varsity Athlete

Philadelphia, PA

August 2025 – Present

- Dedicate 20+ hours weekly to year-round training, competition, film review, and recovery while balancing rigorous academics at Penn, strengthening discipline, time management skills, and high-performance under pressure in a Division I environment and team setting
- Compete in freestyle, breaststroke, and relay events alongside teammates, contributing to a collaborative, high-performance team-wide culture that reinforces accountability, adaptability, and consistent execution in competitive settings and championship meets

EXPERIENCE

Make A Play Investment Banking Fellowship sponsored by UBS

[Selected Transaction Experience](#) | [Pitch Book](#) | [Client Presentation](#)

Remote

June 2026 – Present

- Selected from top 10% of Make A Play's Regular Season to participate in Summer Fellowship
- Led the Planning Phase for a 5-person deal team, building Synthesia's financial summary and operating KPI analysis for a final recommendation to UBS Directors: Andrew Heller & John Delgado

Student-Athlete Investment Club

Markets Committee Member

Philadelphia, PA

February 2026 – Present

- Develop weekly market newsletters summarizing current events, macroeconomic developments, and equity market movements that strengthen investment knowledge across the student-athlete community
- Collaborate with different committee members at Penn to analyze global market trends, contributing to group meetings and discussions

NYU Langone School of Medicine Neuroscience Lab

Intern

New York, NY

June 2024 – August 2024

- Investigated the effectiveness of stellate ganglion block injections for severe PTSD by collecting and analyzing CAPS-5 data across patient assessments, generating insights that supported ongoing clinical research, treatment evaluation, and patient outcome analysis
- Operated fMRI equipment and organized patient datasets for neuroscience studies, ensuring accurate data collection and documentation that strengthened research integrity and improved cross-functional collaboration across clinical and research teams

Asphalt Green Unified Aquatics

Assistant Coach, AGUA Elite and Rising Stars Clinics

New York, NY

June 2026 – July 2026

- Coached 7-14-year-old children in swim team practices, gave stroke technique advice, and assisted in dryland exercises

New York University Swim Camp

Lifeguard

New York, NY

July 2026

- Certified lifeguard for NY Swim Camp

LEADERSHIP & COMMUNITY DEVELOPMENT

The Nightingale-Bamford School

Peer Mentor

New York, NY

September 2022 – May 2025

- Mentored elementary students through weekly after-school sessions, providing individualized support in math, reading, and assessment preparation that strengthened academic confidence, learning outcomes, long-term study habits, and classroom engagement

Native Youth Leadership Summit

Delegate

Washington, DC

February 2024

- Represented the Cowlitz Indian Tribe at the National Congress of American Indians conference, collaborating with delegates from tribes nationwide to evaluate policy issues and develop recommendations impacting Native communities across diverse areas/regions
- Prepared and delivered a presentation to NCAI members, synthesizing diverse perspectives into actionable policy proposals

TECHNICAL SKILLS & INTERESTS

Skills: Excel, Word, PowerPoint | **Programs:** HTML, CSS, JavaScript, RStudio, R, ChatGPT, Claude

SKY KEYOUNG

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EDUCATION

Harvard College – Cambridge, MA

Anticipated Graduation: May 2029

Double A.B. in Economics and Psychology | Minor in Data Science | ACT: 36 | GPA: 3.80/4.0

- Accomplishments: Harvard Book Award Winner, 15x Science Olympiad Medalist, Valedictorian (1/435), National Merit Scholar, 12x First-Place Vocal Competition Winner (Opera/Musical Theater)
- Relevant Courses: Macroeconomics, Microeconomics, Using Big Data to Solve Economic and Social Problems, Democracy & Dev. in South Korea
- Programs: Harvard Women's Rowing, Harvard WECODE, Harvard Woodrow, Harvard Women in Business, Harvard Korean Association

PROFESSIONAL EXPERIENCE

Hugel Aesthetics – *Artificial Intelligence & Corporate Finance Intern* | Newport Beach, CA

06/2026 – Present

- Worked directly with CEO, COO, and CFO of \$3.6B net cap biotech and aesthetics company to develop AI-backed financial tracking systems using Salesforce, Cardinal Health, Snowflake, and Claude Code as first ever paid college intern
- Coordinated across all sectors of business, sales, finance, marketing, and medical affairs to develop plan for global launch of a new neurotoxin

MAP x UBS – *Investment Banking Summer Fellow, Finalist* | Remote

06/2026 – Present

- Selected as 1 of 100 NCAA athletes nationwide (15% acceptance rate) and ranked top 20 for MAP's Money Ball Fellowship sponsored by UBS, focused on investment banking recruiting, technical preparation, and cross-border private equity strategy
- Participate in a live case competition with 4 other summer athletes to recommend an emerging European consumer technology company for a U.S.-based private equity acquisition, analyzing FX exposure, leverage strategy, market entry dynamics, and operational scaling opportunities

Harvard Innovation Labs (i-lab) – *Student Fellow* | Cambridge, MA

01/2026 – Present

- Selected as an Explore Fellow to pursue early-stage venture exploration through customer discovery, problem validation, and rapid experimentation to develop, market, and test research startup ideas

Harvard University Venture Capital Group – *Analyst* | Cambridge, MA

09/2025 – Present

- Conduct diligence and sourcing with Insight Ventures to identify and interview startup founders from pre-seed to Series A for growth strategy; assess product differentiation, market size, traction, and fundraising readiness
- Build investment memos synthesizing founder insights, competitive markets, and growth risks for investment decisions

Harvard University Clean Energy Group (HUCEG) – *Pre-Seed Venture Scouting and Policy Reform Analyst* | Cambridge, MA

06/2025 – Present

- Source and research the utility and energy landscape across IL, VA, and KY, analyzing capacity breakdown, market structure, key stakeholders, and investment opportunities to determine data center growth and development
- Identify and interview early-stage climate tech startups to assess fundraising barriers and market potential/impact

LEADERSHIP & COMMUNITY DEVELOPMENT

Harvard-Radcliffe Women's Heavyweight Rowing Team – *Coxswain* | Cambridge, MA

10/2026 – Present

- Lead a Division I crew, directing race strategy and commanding real-time execution with time-critical calls under high-pressure competition while balancing a ~30-hour/week athletic commitment with a full academic course load

The UC-CSU Environmental and Climate Change Literacy Projects – *Steering Committee Member* | Los Angeles, CA

03/2023 – Present

- Collaborated with faculty across 33 UC-CSU campuses to design K-12 climate literacy policy recommendations, shaping curricula reaching 500,000+ California graduates annually.

ClimateLitNow – *Founder, President* | Newport Beach, CA

06/2022 – Present

- Built a global climate literacy 501(c)(3) reaching 5,000+ students and 70+ educators worldwide; trained leadership in outreach and impact measurement, scaling organizational capacity across three continents.
- Raised funds through grants and partnerships, delivering 30+ keynotes and panels to drive adoption of climate literacy frameworks across regional and international organizations.

RESEARCH EXPERIENCE

University of California, Irvine & Ohio State University – *Wildfire Policy Research Assistant* | Irvine, CA

06/2024 – 09/2024

- Collaborated with UCI and Ohio State faculty on NFF-funded research examining how Community Wildfire Protection Plans build social capital, producing findings with direct implications for underserved community resilience.
- Built a national database of 2,300+ CWPPs with the U.S. Forest Service, enabling large-scale quantitative analysis of equity gaps in forest planning.

University of California, Irvine Flood Lab – *Post-Fire Flood Modeling Research Assistant* | Irvine, CA

06/2023 – 07/2023

- Programmed geospatial analysis functions in MATLAB and ArcGIS to map water and culvert systems across Riverside County, generating outputs used in published post-fire flood research.
- Conducted statistical analyses on large rainfall and flood cycle datasets, identifying patterns that directly informed the development of targeted flood mitigation strategies.

NON-TECHNICAL SKILLS & INTERESTS

- Skills and Language(s): Python, JavaScript, R, MATLAB, ArcGIS, Data Analysis, Korean (intermediate fluency), Spanish (conversational)
- Interests: Artificial Intelligence, Tech-Based Investing, Opera, Music & Theater Production, Film & Media

Sophia Yang

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EDUCATION

Massachusetts Institute of Technology

Bachelor of Science in AI & Decision Making

Cumulative GPA: 4.5/5.0 | SAT: 1530

Cambridge, MA

Expected Graduation: May 2029

- **Relevant Courses:** Intro to Algorithms, Fundamentals of Programming, Linear Algebra, Multivariable Calculus
- **Organizations:** MIT Women's Tennis, MIT Society of Women Engineers, MIT Asian Dance Team, MIT Concert Choir
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 09/2026)

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow

Remote

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Temenos — *Cloud-Based Banking Software & Financial Technology Platform (Technology M&A / Capital Markets + Strategic Advisory Simulation)*
 - Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Execution Phase for a deal team of 5, building Temenos's valuation/transaction analysis for a live recommendation to UBS Directors [Andrew Heller](#) | [John Delgado](#) | [Stephen Saville](#)
 - Built a financial and valuation model analyzing 11.3x LTM EV/EBITDA versus a 21.4x peer median, benchmarking 4 public software peers and testing operating assumptions across margins, taxes, capex and working capital to assess Temenos' potential
 - Analyzed 3 precedent transactions spanning 17.8x–30.7x EV/EBITDA and evaluated 3 execution, regulatory and market risks across 150+ markets, incorporating Temenos' 950+ core and 600+ digital clients to frame valuation sensitivities and profile/s

StarCompliance

Research and Development Intern

Remote

Jun 2026 – Aug 2026

- Developed full-stack features for an AI-powered enterprise compliance platform serving a potential user base across 400+ clients and 1.2M users, using .NET, React, TypeScript, and SQL to support policy management and citation-backed AI Q&A
- Engineered 46+ tenant-scoped REST endpoints and backend services supporting secure document management, role-based access, and versioned publishing while aligning frontend functionality with the firm's established UI design system
- Built scalable AI and document-processing infrastructure using Azure Functions, Service Bus, and retrieval-augmented generation, enabling searchable policy content and verifiable in-app citations while developing automated evaluation tools to identify regressions

Harvard-MIT Health Sciences and Technology

Undergraduate Researcher, Physician-Scientist Data Output Team

Cambridge, MA

Jan 2026 – May 2026

- Designed a composite scoring framework unifying five heterogeneous impact dimensions (publications, grants, patents, clinical trials, commercial) into a single normalized 0–100 metric, surfacing high-impact researchers that bibliometric ranking missed entirely
- Built Python and SQL pipelines using CockroachDB, PubMed, OpenAlex, and Dimensions AI APIs to collect, clean, and analyze large-scale publication, grant, patent, and clinical trial records
- Validated ranking stability with 300–1,000-iteration Monte Carlo simulations over 6+ perturbed scoring parameters, holding mean Spearman $\rho = 0.98$ (0.88 worst case) and rank-shift standard deviation under 2% of total range

COSMOS at UCLA – Artificial Intelligence Cluster

Cluster: From Medicine to Hollywood - Artificial Intelligence for Speech & Imagery

Los Angeles, CA

Jul 2024 – Aug 2024

- Fine-tuned and evaluated 3 transformer-based NLP models to identify media bias across international and domestic news publications, achieving 78% classification accuracy while analyzing model performance through confusion matrices and learning curves effectively
- Completed 5+ applied AI projects using real-world datasets across machine learning, speech and image processing, translating mathematical concepts into algorithms + presenting technical findings through weekly briefings & a final UCLA research symposium

LEADERSHIP & COMMUNITY DEVELOPMENT

MIT Society of Women Engineers

Career Development Board Member

Cambridge, MA

Sep 2025 – Present

- Collaborate with board and career-services partners to coordinate employer information sessions, recruiting events and professional workshops, including a behavioral interview program for 30+ students, expanding access to career resources/connections

Northwood High School Math Olympiad Club

Vice President & Tutor

Irvine, CA

Aug 2024 – May 2025

- Led competition-math programming for 30+ students by developing and presenting technical lectures, administering AMC 10/12 and CAML competitions and coordinating a peer tutoring program with faculty, expanding access to structured mathematics preparation

Northwood High School Dance Theater

Captain

Irvine, CA

Aug 2021 – May 2025

- Led 50+ dancers across original choreography, flash mobs and annual performances while coordinating schedules, teacher-student communication & promotional campaigns, strengthening program visibility, team cohesion + execution across 4 years of involvement

NON-TECHNICAL SKILLS & INTERESTS

Languages/Skills: Python, Java, Excel, SQL, Mandarin (fluent)

Interests: Artificial intelligence, software, finance, community engagement, scientific discovery, innovation

Awards: American Invitational Mathematics Examination Qualifier, USA Computing Olympiad Silver, National Merit Finalist, Crack the Code Hackathon (Concordia University) 3rd place, OC Artist of the Year Nominee (Dance), President's Volunteer Service Award Silver

Stefan Karatosic

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EDUCATION

Emory University, Goizueta Business School

Intended Bachelor of Business Administration, Finance

Cumulative GPA: 3.9/4.0

Relevant Courses: Financial Accounting, Corporate Finance, Macroeconomics, Microeconomics

Atlanta, GA

May 2029

WORK EXPERIENCE

Gardner Acquisitions & Closings

Financial & Deal Analysis Intern (Remote)

Newport Beach, CA

Aug. 2026 – Present

- Underwrite \$5–50M EBITDA lower middle market targets, rebuilding adjusted EBITDA and testing add-backs
- Build 3-5 year operating models, set valuation, and run a lender coverage test before each offer package
- Draft ~25 broker diligence questions per deal and support post-LOI quality of earnings review

UBS x MAP

Investment Banking Summer Fellow (Remote)

Ewing, NJ

Jun. 2026 – Present

- Selected as 1 of 12 from 594 applicants (top 2%) to lead the execution phase for a 5-person deal team
- Built a 10-year operating model on £126.4M LTM revenue; ran a DCF at 12.7% WACC and 6 precedent transactions
- Presented our findings and recommendation to UBS directors; earned 5-Star Status, top 10% of fellows

Cyrus Capital Partners

Distressed Credit/Restructuring Intern

New York, NY

Jun. 2026 – Aug. 2026

- Analyzed distressed credit markets for a \$3.6B fund, assessing leveraged loan dispersion across the software sector
- Spread and forecast financials for 6 issuers, supporting long/short views across their capital structures
- Modeled Kaseya's financials to project FCF and leverage capacity across base, downside, and upside scenarios

Baka's Pekara (Bakery)

Co-Founder

Belgrade, Serbia

Jan. 2025 – Jun. 2026

- Co-founded and operated a bakery, managing 7 employees across pricing, suppliers, financials and operations
- Tracked P&L, revenue, COGS, margins, and cash flow to guide daily production volume and profitability decisions
- Sold over 30,000+ pastries while also evaluating acquisition opportunities for expansion into a second retail location

LEADERSHIP & COMMUNITY INVOLVEMENT

Love Serving Autism

Certified Adaptive Racquet Sports Coach

Miami, FL

Aug. 2026 – Present

- Coach 20+ children per clinic with autism spectrum disorder and related special needs in adaptive tennis lessons
- Design and run 15+ drills per clinic, tailoring equipment and instruction to each child's individual needs

Emory Varsity Men's Tennis

Varsity Athlete

Atlanta, GA

Sep. 2025 – Present

- Earned 5-star recruit status, ranked #68 in the U.S. class of 2025; competed 10+ yrs in USTA and ITF tournaments
- Commit 20+ hours weekly to training and high-pressure matches across a demanding collegiate travel schedule

Goizueta Venture Capital

General Body Member

Atlanta, GA

Sep. 2025 – Present

- Attend founder pitches and investor sessions with active venture capital and private equity professionals
- Learn how institutional investors evaluate markets, founders, growth, risk, and emerging business model potential

ADDITIONAL INFORMATION

Skills: Serbian (Working Proficiency), MS Suite, Claude Cowork, Bloomberg Market Concepts

Interests: City-Biking in NYC, Electronic Music, Shark Tank, Padel, Running, Saltwater Fishing

Sunnie Wang

Phone: (972) 213-7555 | Email: sunnie_wang@brown.edu | linkedin.com/in/sunniewang-/

EDUCATION

Brown University - GPA: 4.0/4.0

Providence, RI

B.S. Applied Math-Economics; B.A. Computer Science

Expected Graduation: May 2029

- **Courses:** Microeconomics (Math), Probability & Statistics, Data Structures/Algorithms, Linear Algebra, Multivariable Calculus

The Hockaday School - GPA: 4.05/4.0

Dallas, TX

SAT: 1540 | 800 Math, 740 Reading

Graduated: May 2025

- Student Body President, Varsity Lacrosse 4x State and Conference Champions, 2x Academic All-American, Student Admissions Ambassador, Coding Club Founder, Citizenship Award, Computer Science Award, Cum Laude Society, Varsity Field Hockey

PROFESSIONAL EXPERIENCE

Fortress Investment Group, Credit SS Management/Strategy Intern

Dallas, TX | Jun 2026 – Jul 2026

- Evaluated 15+ investment opportunities across healthcare, technology, industrials, and consumer sectors; reviewed investment memos to participate in deal discussions with Managing Directors over key credit considerations and investment risks
- Collaborated with six interns to conduct in-depth research and develop an IC pitch, underwriting a ~\$350M investment in an accessibility and mobility business serving the aging-in-place market; presented thesis and analysis to senior leadership.
- Built a financial model following site visits to Mammoth Freighters and Aspire MRO facilities, projecting ~\$550M in long-term cash revenue and analyzing profitability sensitivity to labor efficiency assumptions under various operational scenarios

MAP x Bank of America, Winter Investments Formula 1 Fellow

Remote | Dec 2025 – May 2026

- Selected as 1 of 50 NCAA athletes nationwide for a 10-week investment banking fellowship sponsored by Bank of America
- Advanced to Final Round to participate in a sponsored case competition targeting a company within the healthcare sector
- Earned 5-Star Status - highest distinction awarded to ~10% of Playoff Fellows for execution and performance under pressure

Hope Street Capital, Search Fund Intern

Providence, RI | Sep 2025 – Dec 2025

- Conduct broad industry exploration and market mapping to identify potential sectors and companies suitable for acquisition
- Research and compile data on businesses, gathering insights from public sources, databases, and outreach efforts
- Collaborate directly with founders in weekly meetings to discuss progress, share findings, and determine next-step priorities

State National Companies (Markel Group Inc.), Business Development Intern

Dallas, TX | Jun 2025 – Aug 2025

- Led an AI-driven contract extraction project using Python, OCR, and Llama 3.2 LLM, developing a prototype retrieval-augmented generation (RAG) model with vectorization and embeddings to identify variable commission terms
- Presented findings and model outputs to executive leadership, demonstrating potential for automation in contract analysis
- Conducted market research in the cybersecurity sector to analyze premium viability and potential client expansion

Hockaday Upper School Student Council

Dallas, TX | Aug 2021 – May 2025

Executive President (2024-25), Financial Officer/Parliamentarian (2023-24), Secretary (2022-23), Class President (2021-22)

- Led weekly Executive Council meetings with faculty and administration to coordinate initiatives, drive accountability, and oversee execution of school-wide programs enhancing community engagement, inclusion, and student wellness
- Managed budgeting, planning, and logistics for all major school events and campus traditions, ensuring seamless execution

EXTRACURRICULAR EXPERIENCE

NCAA Division 1 Student Athlete, Brown University Women's Lacrosse Team

Providence, RI | Aug 2025 – Present

- Committed ~30 hours/week to practice, strength training, competition, and team activities while balancing rigorous academics
- Collaborate with teammates and coaches to achieve competitive goals in a high-pressure, performance-driven environment

DearPiggy YouTube Channel, Founder

Dallas, TX | Mar 2020 – Present

Youtube.com/@dearpiggy3506

- Founded and managed an educational YouTube channel producing over 130 coding tutorials across five programming languages, accumulating 30,100+ views and 840+ watch hours from an audience spanning twelve countries worldwide
- Design, script, and edit videos covering topics in Java, JavaScript, Python, HTML/CSS, and Data Structures and Algorithms

SKILLS & INTERESTS

Technical Skills: Python, Java, C++, JavaScript, Excel, Financial Modeling, PowerPoint, HTML & CSS, Llama LLM, ReasonML

Additional: Uber Global Hackathon Global Finalist, Harvard WECODE Ambassador - Distinguished Initiative Award

Interests: Sports, Running, Pickleball, Dallas Mavericks, Card Games, Cooking, Restaurants, Baking, DIY Projects, Pottery Painting

Sutton G. Van Dyk

[LINKEDIN PROFILE](#) • +1 (530) 601-7766 • SGVANDYK@UCDAVIS.EDU

EDUCATION

University of California, Davis

Bachelor of Science in Business

Davis, CA

Expected Graduation: April 2029

- **Cumulative GPA:** 3.43/4.0
- **Accomplishments:** NCAA Division 1 Athlete (Field Hockey)
- **Relevant Coursework:** Micro and Macroeconomics, Calculus for Data-Driven Applications, Principles of Financial Accounting

PROFESSIONAL EXPERIENCE

Bank of America Student Leader

Intern

Sacramento, California

June - July 2026

- Selected as 1 of 250 Bank of America Student Leaders nationwide to attend the Leadership Summit in Charlotte, NC, engaging in professional development programming on nonprofit leadership and community impact
- Engaged directly with 150 K-8 youth through daily programming while gaining exposure to nonprofit operations, including chartering requirements, financial statement review, and a \$4M facility redevelopment plan
- Studied the organization's growth strategy and funding model, including community needs assessments used to site new clubs and corporate sponsorships (BMO, Old Navy, Panda Express, U.S. Bank) that underwrite free programming

MAP x Deloitte

Make a Play Foundation AI Innovation & Digital Strategy Fellow

Remote

Jan - March 2026

- Led planning with a 5-person case team to map LA28's fragmented digital stack, benchmarking 40+ capabilities against NBA, NFL, and MLB to identify gaps in fan identity, personalization, and AI-driven content delivery
- Built a business case for an AI-enabled personalization roadmap, evaluating cost and revenue implications of new capabilities (chat interfaces, predictive event discovery, 3DAT replay integration) to prioritize highest-ROI investments

Davis Women in Business

OWN IT Board Associate

Davis, California

Sep 2025 - Present

- Managed and cultivated 20+ sponsor relationships for UC Davis's largest women's leadership conference and wellness festival, securing funding that supported 200+ attendees and elevated the event's visibility and financial sustainability
- Managed recruitment, contracting, and performance scheduling for 3 student entertainment groups, negotiating fees within budget constraints to maximize value delivered per dollar spent

Economics and Business Student Association

General Member & Case Competition Finalist

Davis, California

April 2026 - Present

- Tied for 4th place out of 13 teams in a case competition, developing "Emergency Assist," an Amazon Alexa-integrated caregiving product for the remote elder care market
- Conducted financial statement analysis of Amazon's 10-K to inform revenue assumptions and built a business case, including competitive positioning and go-to-market strategy, presented to a panel of judges

Earls, Beach House Restaurant

Hostess

West Vancouver, British Columbia

May 2025 - Jul 2025

- Managed reservations and guest flow for a 200-seat, 4.5-star waterfront restaurant, coordinating seating strategy and host-server communication to maintain efficient table turnover and service pacing during consistently high-volume peak hours
- Delivered consistent guest interactions that reinforced brand standards while onboarding and training 4 new hosts on communication protocols, seating procedures, and service-quality expectations

LEADERSHIP & COMMUNITY DEVELOPMENT

UC Davis Field Hockey

NCAA Division 1 Student-Athlete

Davis, CA

Sep 2025 - Present

- Balance 20+ weekly Division I training hours with a full academic load, strengthening discipline, resilience, and on-field execution while collaborating with 21 teammates and 3 coaches in a high-performance environment
- Manage coursework, exams, and travel logistics across time zones while balancing frequent East Coast competition travel as one of just 3 West Coast Division I field hockey programs, within a fast-paced 10-week quarter system

Student-Athlete Advisory Committee (SAAC)

Field Hockey Representative

Davis, CA

Sep 2025 - Present

- Represent UC Davis Field Hockey within SAAC, partnering with 40+ student-athletes to shape initiatives improving wellness, resources, and equity across all 25 Division I programs while communicating feedback between athletes and administrators
- Led service and engagement efforts, including blanket-making for UC Davis Children's Hospital, to support local families and expand department impact through recurring community-based outreach initiatives

ADDITIONAL SKILLS & INTERESTS

Completed Programs: Morgan Stanley Next Play Virtual Series (2026), Expert Level Expedition EY Apprenticeship (2026), Oliver Wyman First-year Immersion Program (2026)

Interests: Field Hockey, Live Music, Entrepreneurship, Podcasts, Cooking, Watching Sports, Slalom water skiing, Playing the Piano

Taylor S. Francis

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EDUCATION

Georgetown University

Bachelor of Science in Business

Washington, DC

Expected Graduation: May 2029

- **Cumulative GPA:** 3.3/4.0 | **ACT:** 33
- **Honors/Awards:** Softball, Pingry Legacy Cup (Outstanding Leadership & Athletic Ability), Somerset County Scholar Award
- **Relevant Courses:** Introduction to Financial Accounting, Management and Organizational Behavior, Computational Business Models, Business Statistics, Principles of Microeconomics, Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow

Remote

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) | [Investment Fact Sheet](#) | [Client Presentation](#)

- Temenos — *Cloud-Based Banking Software & Financial Technology Platform (Technology M&A / Capital Markets + Strategic Advisory Simulation)*
 - Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Planning Phase for a deal team of 5, building Temenos's financial summary and operating KPI analysis for a final recommendation to UBS Directors: **Andrew Heller** & **John Delgado**
 - Evaluated Temenos' \$861M ARR, 32.7% EBIT margin and ~\$645M net debt, incorporating 14.6%–20.7% core banking market growth and management's \$1.23B FY2028 ARR target to assess operating leverage, liquidity and growth assumptions for thesis
 - Co-designed a 12-page pitch book assessing 4 market trends, including a \$5.88B–\$13.24B U.S. core banking expansion and 54% GenAI deployment rate, applying 20 hours of Wall Street Prep accounting prep to establish key diligence priorities for the team

Zoned Sports Academy

Softball Coach & Camp Counselor

Bridgewater, NJ

Jun 2025 – Aug 2025

- Coached 30+ youth athletes across varying experience levels by teaching softball fundamentals, position-specific skills and game strategy through daily drills and competitions, providing individualized feedback that improved overall player confidence and technique
- Collaborated with 5+ coaches to organize practices, supervise large groups and lead team-building activities throughout summer camp, balancing safety with competitive instruction while creating an organized environment that encouraged teamwork and sportsmanship

Cha Cha Doodles

Dog Breeder Assistant Volunteer

Columbia, NJ

May 2025 – Jun 2025

- Provided daily care, feeding and socialization for 10+ puppies while maintaining a safe living space, monitoring individual needs and supporting adoption preparation, ensuring each dog received sufficient attention while transitioning successfully to a permanent home
- Redesigned 1 organizational website and expanded social media outreach to showcase available puppies, while communicating with prospective owners, supporting marketing efforts that increased online visibility/connected families with quality adoption placements

LEADERSHIP & COMMUNITY DEVELOPMENT

Georgetown Varsity Softball | [News](#)

NCAA Division I Student-Athlete & Shortstop

Washington, DC

Sep 2025 – Present

- Dedicate 40+ hours weekly to NCAA Division I softball through practices, strength training, competition, travel and team meetings while managing a full Georgetown course load, developing discipline, organization + consistency required to perform under pressure
- Collaborate with 20+ teammates and coaches through daily training, film review and competition, responding to feedback and communicating across the field while developing leadership & accountability that contribute to stronger team chemistry/performances

The Hidden Opponent

Member

Washington, DC

Sep 2025 – Present

- Participate in 1+ monthly workshops alongside Georgetown student-athletes focused on mental health, wellness and personal development, engaging in reflective discussions and community-building activities that promote self-awareness & stronger connections
- Engage with 10+ alumni, professional athletes and peers through discussions on resilience, leadership and goal-setting, applying perspectives from competitive environments to personal development while contributing to a community focused on athlete wellness

Athletes Invest

General Education Member

Washington, DC

Feb 2026 – Apr 2026

- Participated in a 3-month finance education program designed for student-athletes, building foundational knowledge of financial markets, corporate finance and investment principles through structured workshops + discussions that increased prep for high-finance
- Attended 2+ workshops monthly covering finance recruiting, resume development and career preparation while engaging with fellow student-athletes interested in the industry, developing practical recruiting knowledge and a stronger understanding of careers in finance

Peer Leadership, The Pingry School

Student Leader

Basking Ridge, NJ

Sep 2024 – Jun 2025

- Mentored 10 freshmen through their transition into high school by providing guidance on academic, social and personal challenges, building consistent relationships throughout the year that helped younger students navigate new responsibilities with more confidence
- Facilitated 1 weekly advisory session focused on leadership development, community building and student concerns, creating an affable environment for freshmen to seek guidance while strengthening relationships between under → upper classmen across campus

NON-TECHNICAL SKILLS & INTERESTS

Skills: Excel, Python | **Interests:** Baking, Country Music, Softball, Basketball, Golf, Travel

Thomas W. Sheehan

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EDUCATION

Princeton University

Bachelor of Arts in Economics | Minor in Optimization & Quantitative Decision Science

Princeton, NJ

Expected Graduation: May 2029

- **Cumulative GPA:** 3.9/4.0 | **ACT:** 36
- **Relevant Courses:** Microeconomics, Macroeconomics, Calculus II, Writing Seminar, Intermediate/Advanced Spanish

Belmont Hill School

Belmont, MA

September 2021-June 2025

- **Honors/Awards:** 4.37/4 GPA, Varsity Football, Baccalaureate Graduation Award, Summa Cum Laude, National AP Scholar
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 09/2026)

PROFESSIONAL EXPERIENCE

Pathway to Possible

Newton, MA

Advancement & Communications Summer Intern

May 2026 – July 2026

- Conducted compensation benchmarking and competitive research across peer organizations to assess market positioning and inform recommendations for staffing and organizational strategy.
- Supported development of a strategic plan for a biannual organizational audit, synthesizing stakeholder information and operational research to identify priorities and inform leadership decision-making.
- Evaluated AI implementation opportunities and reorganized stakeholder data, researching potential technologies and improving internal information management while independently managing multiple projects in a fast-paced, unstructured environment.

UBS

Remote

MAP Investment Banking Fellow

Jun 2026 – Sep 2026

Selected Transaction Experience | [Pitch Book](#) |

- Lovable — *AI-Powered Application Development & Software Platform (Technology M&A / Capital Markets & Strategic Advisory Simulation)*
 - Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Control Phase for a deal team of 5, developing Lovable's investment thesis & deal rationale for a live presentation to UBS
 - Co-designed a 12-page pitch book analyzing \$725B of 2026 hyperscaler capex, 13.5% IT spending growth and EU AI Act compliance risks, applying 20+ hours of Wall Street Prep accounting coursework to frame Lovable's growth outlook for thesis

Belmont Hill School

Belmont, MA

Camp Counselor

Jun 2025 – Aug 2025

- Managed daily programming for 20+ campers ages 8–13, adapting activities and coaching approaches to individual needs and group dynamics while maintaining a structured, engaging environment and communicating clearly with parents regarding campers' progress
- Coordinated 5+ daily activities for campers ages 8–13, balancing schedules, supervision and changing group needs while resolving issues in real time and working with fellow counselors to create a safe, organized & positive experience for children during the summer

Winchester Country Club

Winchester, MA

Caddy

Jun 2021 – Aug 2023

- Delivered attentive service to golfers, managed equipment, anticipated player needs and supported efficient on-course operations while communicating clearly with members and guests and maintaining professionalism in a fast-paced country club setting

LEADERSHIP & COMMUNITY DEVELOPMENT

Princeton University | Varsity Football

Princeton, NJ

NCAA Division I Student-Athlete

Aug 2025 – Present

- Walked on to the varsity football team as a first-year student, committing 25+ hours weekly to practices, strength training, film study, team meetings/competition while balancing a rigorous academic schedule and earning a role on a highly competitive Ivy-League roster

Belmont Hill School Peer Leader Program

Belmont, MA

Head of the Peer Leader Program

Aug 2024 – May 2025

- Led peer mentoring program supporting younger students' transition into Belmont Hill, coordinating meetings and developing community programming while evaluating and selecting future peer leaders to strengthen student engagement and campus integration

Multicultural Alumni Partnership

Belmont, MA

Mentor & Mentee

May 2024 – Present

- Mentored Belmont Hill students on the transition to college while participating in alumni network focused on career exploration, relationship building/professional development, gaining exposure to diverse career paths while strengthening communication/network

Arlington Eats

Belmont, MA

Volunteer

May 2021 – Aug 2026

- Organized and distributed food and hygiene supplies to ~450 households weekly, supporting high-volume community market operations while serving as a Spanish translator for families in Massachusetts, improving communication + helping navigate resources

NON-TECHNICAL SKILLS & INTERESTS

Skills: Microsoft Excel, PowerPoint, Spanish

Interests: Outdoor activities (Fishing, hiking, and snowboarding), sports, chess, and volunteer work

Trenton C. Cassens

281-806-9534 | Houston, TX | Trenton.Cassens@emory.edu | [LinkedIn](#)

EDUCATION

Emory University, Goizueta Business School

Atlanta, GA

Bachelor of Business Administration; Bachelor of Arts in Economics

May 2029

Cumulative GPA: 3.74/4.00

Relevant Coursework: Financial Accounting, Economics, Data and Decision Analytics, Corporate Finance, International Trade

EXPERIENCE

ProPetro Holding Corp. (PROPWR)

Houston, TX

Business Operations Intern

May 2026 – Aug 2026

- Drove adoption of four self-built Excel tools for pricing, opportunity tracking, budgeting, and benchmarking into recurring commercial workflows, presenting to 10+ team members including VPs and directors, with all four implemented for use
- Developed an indicative quote calculator using 51 historical Power-as-a-Service (PAAS) and PPA pricing series to support live customer pricing and commercial development; back-tested at median absolute errors of 10.3% and 9.5%, respectively
- Built an Installation & Commissioning budgeting model using \$5.46 million of historical costs across nine sites and 66.7 MW, analyzing 800+ cost records to support site-level budgeting, cost estimates, and commercial planning across projects
- Consolidated 122 proposal documents across 67 opportunities and 45 customers into a 2.1 GW commercial pipeline tracker
- Presented PAAS/PPA solutions to 10+ E&P operators at the Permian Basin Power Conference and fielded client questions

Make A Play Foundation (MAP)

Remote

Investment Banking Fellow

Jan 2026 – Present

Option Care Health: Home Infusion Therapy Advisory Simulation | [View Pitch Book](#)

- Earned selection as 1 of 50 NCAA student-athletes from 500+ applicants for a Bank of America-sponsored investment banking fellowship; ranked in the top 4% of fellows and advanced to MAP's five-month Pro Bowl for intensive training
- Train monthly with professionals from UBS, Guggenheim, Bank of America, Morgan Stanley, and Wells Fargo in accounting, enterprise/equity value, valuation, DCF analysis, and M&A through casework, technical drills, and interviews
- Led home-infusion demand analysis using senior-population growth, Medicare Advantage enrollment, and disease trends
- Analyzed FY2025 preliminary results and Q3 balance-sheet data to evaluate revenue, margins, and healthcare KPIs

Eagle Swim Club

Atlanta, GA

Assistant Coach

Aug 2025 – Present

- Coach and mentor 20+ swimmers ages 6–13 in stroke mechanics, endurance, race strategy, teamwork, and discipline
- Design and lead 4+ weekly practices, tailoring warm-ups, drills, and workouts to strengthen technique and meet readiness

LEADERSHIP & ACTIVITIES

Emory University Men's Swimming & Diving

Atlanta, GA

Varsity Swimmer

Sep 2025 – Present

- Competed in the 100-yard freestyle at the 2026 NCAA Division III Championships, where Emory finished fifth nationally
- Earned 2026 CSCAA Scholar All-America First Team honors, recognizing academic and NCAA athletic excellence
- Commit 25+ hours weekly across training, team travel, and competition while maintaining a full academic course load

Emory Matriculate

Atlanta, GA

Advising Fellow

Sep 2025 – Present

- Advise four high-achieving, low-income students weekly on college selection, essays, financial aid, and applications

Emory Student Alumni Board

Atlanta, GA

Board Relations Member

Sep 2025 – Present

- Coordinate 5+ student-alumni engagement initiatives spanning events, outreach, networking, and mentorship; collaborate with 10+ board members and alumni leaders on program planning and execution to strengthen student-alumni connections

ADDITIONAL INFORMATION

Technical: Microsoft Excel, PowerPoint, Word, Coding (Python, Java, JavaScript, R Script), Data Analysis & Visualization

Certifications: Bloomberg Market Concepts, Bloomberg Spreadsheet Analysis, QuickBooks Certified User

Honors: 2026 UAA Team Champion, NISCA Academic & Athletic All-American, USA Swimming Scholastic All-American

Interests: Drone Piloting (FAA Part 107 Remote Pilot), South American Travel, Weightlifting, Triathlons, Golf, Hiking

Uma Patnaik

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EDUCATION

Dartmouth College

Bachelor of Arts in Philosophy, Politics & Economics | Minor in Computer Science

Hanover, NH

Expected Graduation: May 2029

- **Cumulative GPA:** 3.97/4.0
- **Honors/Awards:** Citation for Academic Excellence in Spanish Writing and Reading: A Critical and Cultural Approach
- **Relevant Courses:** Political Ideas, International Trade, Introduction to Programming & Computation
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 09/2026)
- **Organizations:** Squash, Women in Business, Dartmouth Asian Student-Athlete Association

Richard Montgomery High School

International Baccalaureate (IB) and AP Student

Rockville, MD

June 2025

- **Cumulative GPA:** 4.95 (weighted) / 4.00 (unweighted) | **SAT:** 1560
- **Honors/Awards:** IB Diploma, Maryland Seal of Biliteracy (English & Spanish), AP Scholar with Distinction, 4x US Squash Scholar Athlete Award (2022-2025), Second Team All-Star Award (National Capital Squash), NAIMUN Best Delegate (2024)
- **Organizations:** US Squash, Professional Squash Association, The Tide newspaper, Spanish Honor Society, Model UN

PROFESSIONAL EXPERIENCE

UBS

MAP Investment Banking Fellow

Remote

Jun 2026 – Sep 2026

- Darktrace — *AI-Powered Cybersecurity & Threat Intelligence Platform (Technology M&A / Capital Markets & Strategic Advisory Simulation)*
 - Selected as 1 of 12 NCAA athletes out of 594 (top 2.0%) to lead the Planning Phase for a deal team of 5, building Darktrace's financial summary and operating KPI analysis for a final recommendation to UBS Analyst **Amira Singh**
 - Evaluated Darktrace's 25% LTM EBITDA margin, 28% 2026E margin, and \$384M–\$430M net cash position, analyzing market trends + drivers and benchmarking 4 cybersecurity peers to assess operating leverage, balance sheet strength and key financial risks for team
 - Co-designed a 12-page pitch book analyzing 4 cybersecurity trends, including 87% of organizations identifying AI vulnerabilities as a leading risk, applying 20+ hours of Wall Street Prep accounting coursework to connect financial performance → final thesis

El Torky Squash Academy / Potomac Squash Club

Coach & Event Planner

Potomac, MD

Jun 2023 – Present

- Coached 50+ women and junior athletes through weekly squash clinics alongside world-ranked El Torky professionals, organizing small-group drills, match play and fitness sessions while providing individualized feedback that improved technique/confidence for all
- Taught 30+ junior players squash technique, match strategy and mental preparation through individual and group lessons, tailoring instruction to athlete skill levels and tournament goals while helping players build stronger fundamentals and prepare for competition
- Organized 3+ community events, including Women in Squash Night during US Squash's Women in Squash Week, coordinating programming while creating social media graphics and promotional emails distributed to 100+ members to increase overall awareness

Action Youth Media (AYM)

Volunteer & Intern

Silver Spring, MD

Jun 2022 – Aug 2022

- Supported 10+ youth apprentices through AYM's documentary filmmaking program, teaching production fundamentals and helping participants research current + local issues, develop stories and produce community-focused documentaries that elevated youth voices
- Created scripts, conducted 5+ interviews and edited video footage for community PSA projects, translating local issues into accessible multimedia stories while collaborating with youth filmmakers and program staff to produce polished content distributed throughout

LEADERSHIP & COMMUNITY DEVELOPMENT

Dartmouth Women's Varsity Squash Team | [News](#)

NCAA Division I Athlete

Hanover, NH

Sep 2025 – Present

- Commit 20+ hours weekly to NCAA Division I squash through training, lifting, conditioning, match analysis and strategy development while balancing Dartmouth coursework, building discipline, time management & consistency across demanding schedule
- Competed in all 16 matches across the 2025-2026 regular season and National Championships, earning pivotal victories against Columbia and Amherst while contributing throughout the lineup to help Dartmouth deliver strong performances against competition
- Helped Dartmouth achieve a program-best 10th-place finish at National Championships, competing in all 3 postseason matches while contributing to a historic season that established the highest national finish in Dartmouth program history

The Tide (Newspaper)

Editor-in-Chief

Rockville, MD

Sep 2021 – Jun 2025

- Managed 100+ writers, photographers and editors through monthly publication cycles, overseeing writing, editing, design, printing and promotion while coordinating deadlines across sections to produce consistent print issues distributed throughout the broader school
- Led 10+ monthly meetings, events and fundraisers while overseeing publication finances, member recruitment, print schedules and graphic design, coordinating the logistical and creative sides of the newspaper to maintain efficient operations & expand participation
- Collaborated across 3+ multimedia sections to develop written, podcast and video content after previously serving as podcast and video editor, applying cross-platform editorial experience to expand digital storytelling + create more engaging coverage for the school

NON-TECHNICAL SKILLS & INTERESTS

Skills: Communication, leadership, problem-solving, interpersonal relationships

Languages: English, Spanish (professional proficiency)

Interests: International studies, behavioral economics, Spanish language and culture, live music, traveling

Programs: Python, Adobe Premiere Pro, Final Cut Pro, Canva, PowerPoint

Victor J. Sandru

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EDUCATION

Emory University – Atlanta, GA

Expected Graduation: May 2029

Bachelor of Business Administration in Finance

Cumulative GPA: 3.92/4.0

Awards/Accomplishments: Top 50 Nationally (Class of 2025) and 5-Star Tennis Recruit

Relevant Coursework: Econ 101, Econ 112, Data & Decision Analytics, Accounting 201, Corporate Finance

Organizations: Economic Investment Forum, Goizueta Venture Capital Club, Varsity Men's Tennis Team, Sigma Chi Fraternity

PROFESSIONAL EXPERIENCE

Dan V. Sandru M.D. – *Accounting & Operations Intern* | Jackson, NJ

Jul 2026 – Aug 2026

- Handle accounting tasks including invoicing, payment processing, and expense tracking to maintain accurate financial records
- Assist with integrating electronic medical records to improve quality measure reporting and support Medicare reimbursement
- Manage patient scheduling and intake for 60+ patients, helping support efficient clinic operations and patient experience

Integrus Partners – *Investment Banking Intern (Remote)* | Dallas, TX

Dec 2025 – Feb 2026

- Screened 200+ companies weekly to identify potential sell-side advisory opportunities and support business development efforts
- Sourced 100+ business owners weekly across the healthcare and HVAC sectors to support acquisition and outreach initiatives
- Participated in 1–2 weekly meetings with senior team members to gain exposure to deal sourcing discussions, client evaluation processes, and the strategic factors involved in lower middle-market transactions.

Little Silver Tennis Club – *Tennis Instructor* | Little Silver, NJ

Apr 2024 – Aug 2025

- Instructed groups of 2-5 players per session, focusing on developing technical skills, footwork, and overall player performance
- Built and managed a client base of 30+ players, developing client relationships and skills in scheduling and communication
- Coached groups of young players during a summer program, building leadership skills and keeping students engaged in training

EXTRACURRICULAR EXPERIENCE

MAP x UBS – Money Ball Summer Fellowship – Investment Banking Fellow | (Remote)

May 2026 – Present

- Selected as 1 of 100 NCAA athletes nationwide (15% acceptance rate from 650+ applicants) for MAP's Money Ball Fellowship sponsored by UBS, focused on investment banking recruiting, technical preparation, and professional development
- Advanced to the Playoff Round (top 20% participant) completing intensive technical preparation in valuation and M&A analysis
- Presented a fairness opinion to UBS professionals and was selected to participate in a 5 month recruiting program for top fellows

Emory Economics Investment Forum – *Consumer & Retail Investment Analyst* | Atlanta, GA

Jan 2026 – Present

- Analyze consumer and retail companies through market research and basic DCF valuation for stock pitch presentations
- Present investment theses by defending valuation assumptions, risks, and broader market trends during group discussions
- Attend weekly presentations from research teams to stay informed on market trends and portfolio management strategies

Emory University Men's Tennis Team – *Student-Athlete* | Atlanta, GA

Aug 2025 – Present

- Balance a full academic course load with 15+ hours weekly of practice, fitness, film review, and travel as a varsity tennis player
- Prepare for the NCAA Division III National Championship through intense training, match analysis, and strategy development
- Collaborate with teammates and coaches throughout the season to prepare for competition and contribute to team success

Goizueta Venture Capital – *General Body Member* | Atlanta, GA

Sep 2025 – Present

- Attend weekly general body meetings focused on how VC investors evaluate business models, market size, and growth potential
- Research startup companies across a variety of industries to better understand how VC firms identify high-growth opportunities
- Connect with venture capital professionals through club-hosted speaker events to deepen understanding of early-stage investing

SKILLS & INTERESTS

Certifications: Bloomberg Market Concepts (BMC), Bloomberg Finance Fundamentals (BFF)

Languages: English (Native) Romanian (Fluent), Italian (Basic), Spanish (Basic)

Interests: Skiing, Poker, Exotic Travel, Liam Neeson Movies, Endurance Running, Electronic Music, Surfing, European Automobiles, Golf

Victoria X. Gao

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EDUCATION

Columbia University

Bachelor of Arts in Financial Economics

New York, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 3.95/4.0 | **SAT:** 1550
- **Honors/Awards:** NCAA Division 1 Student-Athlete (Women's Volleyball), Dean's List (All Semesters)
- **Relevant Coursework:** Intermediate Macroeconomics, Principles of Economics, Calculus III, Calculus-Based Intro to Statistics
- **Programs:** Goldman Sachs Possibilities Series, Guggenheim FDOJ, J.P. Morgan Freshman Focus

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow; Team Captain; Pro Bowl Fellow (Top 1% All Fellows)

Remote

Jan 2026 – Present

Selected Transaction Experience

- Delcath Systems — Oncology Drug-Delivery Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)
 - Led team as 1/15 captains (~2%) from 654 fellows, directing a 5-person deal team through ~5 research sprints/week to recommend Delcath Systems as a strategic acquisition, culminating in a live virtual presentation to BofA bankers on 03/23/26
 - Developed a macro healthcare landscape assessment referencing ~\$11.04T global TAM (2024) and ~\$356B global oncology serviceable market, prioritizing Pharmaceuticals/Medical Devices (2M+ device categories) to contextualize Delcath's promise
 - Constructed a company-level investment profile analyzing Delcath's HEPZATO KIT platform, 76-employee footprint, and competitive positioning against 3 key industry peers (Keytruda, Opdivo/Yervoy, and Sorafenib) to inform diligence priorities

Foothill Ventures

Summer Investments Analyst

Los Altos, CA

May 2026 – July 2026

- Authored investment memos and a sector thesis memo for a \$300M seed-stage deep tech fund, covering infrastructure, deep tech, and healthcare AI, including market sizing, competitive analysis, and management team assessment
- Supported deal execution by conducting post-meeting due diligence on prospective portfolio companies, identifying key risks and investment merits to facilitate IC review
- Built research and pitch decks profiling prospective portfolio companies, including a 15-company competitive landscape analysis across Physical AI, to support partner-level investment discussions

Lionsbridge Financial Fellowship

Columbia University Center for Career Education Fellow

New York, NY

Jan 2026 – Apr 2026

- Selected as 1 of 54 participants for an accounting, finance, and valuation bootcamp led by Chris McGowan, building financial models and analyzing financial statements to strengthen fundamental skills required across IB deal and pitch processes
- Collaborated in multi-team workshops, site visits (KKR, BlackRock, Blue Owl), and peer modeling sessions to interpret key drivers and KPIs, improving analytical fluency, communication, and readiness for analyst-level responsibilities in investment banking

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

Columbia Women's Volleyball

NCAA Division 1 Student-Athlete

New York, NY

Aug 2025 – Present

- Dedicated 30+ hrs/week to practices, lifts, travel, film, and team meetings while maintaining Dean's List coursework, strengthening endurance, reliability, and execution under sustained pressure to support consistent performance across competitive cycles
- Started all 24 matches as a freshman by preparing through scouting, recovery routines, and 20+ weekly touchpoints with coaches and teammates, enhancing adaptability, situational awareness, and on-court decision-making in fast-changing environments

SIVBC/WVBA

Club Volleyball Captain

Bellevue, WA

Nov 2019 – Apr 2025

- Captained elite club teams for 6 years by directing weekly team sessions, coordinating strategy with coaches monthly, and supporting 10–14 athletes, contributing to two third-place national finishes and strengthening composure in high-performance settings

Hunger Intervention Program

Volunteer

Lake City, WA

Jan 2017 – Apr 2025

- Volunteered 3–9 hrs/week across 8 years preparing meals and youth food packs for two school districts, supporting thousands of distributions and strengthening reliability, attention to detail, and steady performance across shifting community needs
- Collaborated weekly with 5–10 rotating adults to execute meal-production tasks and maintained output quality, improving adaptability, teamwork, and operational consistency in environments requiring steady coordination and predictable execution

Lakeside School

Varsity Volleyball Captain & Spirit Club Founder

Seattle, WA

Aug 2021 – Nov 2024

- Led a 14-player varsity team as a two-year captain and four-year starter while founding Spirit Club for a 600-student community, coordinating weekly meetings and coach touchpoints to strengthen cohesion, shared standards, and day-to-day performance culture
- Directed practices, leadership sessions, and school-wide engagement initiatives by collaborating with coaches, administrators, and student leaders across 10+ planning cycles, enhancing communication flow, participation, and the consistency of community impact

SKILLS & INTERESTS

- **Skills and Language(s):** English (Native), Chinese-Mandarin (Fluent), Spanish (Intermediate)
- **Interests:** Football (Seahawks), Baseball (Mariners), Fantasy Football, Coffee (La Colombe and Blank Street), Traveling (Maui), Workout Classes (SoulCycle and SolidCore), Spikeball, Hiking (PNW)

Washington T. Chung

wc849@georgetown.edu | (216) 644-0629 | Cleveland, Ohio

EDUCATION

Georgetown University, McDonough School of Business

Washington, D.C.

Bachelor of Science in Business Administration, Dean's List

Expected Graduation: May 2029

Major: Finance and Accounting

GPA: 3.71/4.00

- **Scholarships:** Marine Corps Semper Fidelis Leadership (1 of 4 recipients from 20,000 eligible applicants), Wings of Eagle, Barnard Family Memorial, John Carroll Baran, Ignatian GU, Moran Family Rowing, Nury Family Rowing, Previti Family Rowing

Relevant Coursework: Financial Accounting, Managerial Accounting, Business Statistics, Economics

WORK EXPERIENCE

Morgan Stanley

Pepper Pike, Ohio

Incoming Wealth Management Intern

June 2027 – August 2027

- Expected to contribute to investment advisory and portfolio support, including equity compensation planning, client onboarding, account administration, and portfolio performance reporting

Georgetown University Alumni and Student Federal Credit Union (GUASFCU)

Washington, D.C.

Director of Financial Literacy

September 2025 – Present

- Led an Auxiliary Department for the world's largest entirely student-run financial institution, growing the group from 29 to 42 interns and contributing to the management of \$20.1M in peak assets under management (AUM)
- Organized financial literacy initiatives and educational workshops, reaching 1,000+ students and community members in partnership with the Center for Multicultural Equity and Access, Career Center, Community Scholars Program, and Greek life organizations

Echo Health Inc.

Westlake, Ohio

Finance and Investment Analyst

June 2026 – August 2026

- Supported the management of a \$300M investment portfolio, focusing on its alternative investments allocation, and produced due diligence and investment reports for \$4.5M in limited partner commitments across multiple private equity funds
- Conducted investment analysis on prospective co-investment opportunities alongside The Riverside Company, evaluating investment thesis, value creation levers, industry dynamics, key risks, and portfolio fit, culminating in a \$1.5M investment
- Maintained accurate records for \$30M+ in payroll disbursements and contributions remittances, supporting operations that process \$220B+ annually to 1.6M+ payees and deliver \$2B+ in client savings through partnerships, while preparing for an active audit

York and Sprague, LLC

North Royalton, Ohio

Office Administrator

May 2022 – August 2025

- Oversaw financial operations by categorizing and managing spending accounts for a \$1.1M food service industry business, ensuring accuracy and budget alignment across all departments
- Reconciled 2,000+ incoming/outgoing transactions using QuickBooks and Excel across multiple accounts to maintain balanced financial records, resulting in first-time audit approval and zero flagged discrepancies

LEADERSHIP & ACTIVITIES

NCAA Division I Rowing

Washington, D.C.

Athlete

2025 – Present

- Trained 30+ hours weekly and competed lightweight in 13 races (5 in the Fall and 8 in the Spring) on \$80,000+ in athletic scholarships, placing 4th in the United States at the 2026 Intercollegiate Rowing Association National Championship
- Invited to the U19 USRowing National Team Selection Development Camp and ranked 4th among recruits nationally (2025)

Morgan Stanley

Ewing, New Jersey

MAP Investment Banking Fellow

March 2026 – July 2026

- Selected as 1 of 50 NCAA athletes nationwide from 500+ applicants for a Morgan Stanley-partnered investment banking fellowship, earning MVP recognition for final pitch presentation and achieving a perfect technical interview score (1 of 6 participants)
- Recommended a "Go" position on Stripe based on projected 2026 revenue of \$8.5–9.0B (+25–30% YoY), EBITDA margin expansion to 20%, and \$1.9T in 2025 TPV, and outlined execution, regulatory, and geopolitical risks with mitigants

NASA Engineering Institute

Cleveland, Ohio

Researcher

August 2023 – May 2025

- Designed and built a solar and battery power system (Arduino, 20W solar panel, rechargeable batteries) using transistors, resistors, diodes, and relays to power motorized fans simulating ISS life-support air circulation
- Programmed microprocessor-based control logic to automatically reroute power to critical systems at low charge levels and trigger shutdown when both solar and battery power were exhausted
- Collaborated with NASA engineers in biweekly technical reviews, presenting results to the NASA Glenn research panel

SKILLS & INTERESTS

- **Skills:** Accounting & Financial Statement Analysis Certification (Wall Street Prep), Proficient in Microsoft Office Suite
- **Interests:** Cleveland Sports, Orchestral Violinist, The Office, Social Media Brand Ambassador, Vinyl Collector, Broadway

WILLIAM KRUSE

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EDUCATION

The Wharton School | May 2029

Cumulative GPA: 3.88/4.00

Bachelor of Science in Economics | Concentration in Finance and AI for Business

Relevant Coursework: BEEP 2500: Managerial Economics (A), MATH 1400: Calculus 1 (A)

Honors & Awards: Ivy League Championship (Basketball), Penn Athletics Team of the Year

PROFESSIONAL EXPERIENCE

Morgan Stanley | Remote

Mar 2026 – Jun 2026

MAP Investment Banking Fellow

- Selected as 1 of 75 NCAA athletes (~20%) to work on a deal team of 5, synthesizing AI-infrastructure research and valuation assumptions into a final thesis recommending Databricks as a target acquisition
- Databricks — Enterprise Data & AI Platform (Tech M&A / Strategic Advisory Simulation)
 - Evaluated ~5 investment themes supporting Databricks' positioning within enterprise AI infrastructure, analyzing \$644B projected GenAI spending, multi-cloud defensibility & recurring enterprise revenue supporting long-term investment opportunities due to scalability/retention
 - Monitored Databricks' projected financial trajectory under a private-equity value-creation framework, analyzing revenue growth from \$4.7B to \$14B, 22-point EBITDA-margin expansion/IPO exit potential supporting a final "GO" recommendation to Morgan Stanley

Norwegian Basketball Federation | Oslo, Norway

Feb 2023 – Jul 2026

Professional Basketball Player, Norwegian National Team

- Selected as 1 of ~100 players to represent Norway in international basketball competitions, strengthening leadership, teamwork, and competitive-performance skills through participation in tournaments like the European Championships, Nordic Championships at the U16, U18, and senior levels with diverse comp
- Organized multiple promotional events and marketing initiatives supporting home games with 5K+ spectators while coaching 5 youth teams, strengthening community-engagement, mentorship and leadership skills helping grow Norwegian basketball participation and international branding

LEADERSHIP AND EXTRACURRICULAR

Penn Quakers Men's Basketball | Philadelphia, PA

Aug 2025 – Present

Division 1 Student-Athlete

- Balanced a rigorous academic workload while dedicating 20+ hours/week to athletic commitments, strengthening discipline, resilience and time-management skills through practices, travel, meetings and competition throughout demanding in-season schedules leading to winning an Ivy League championship
- Engaged with 10+ former Penn athletics alumni through Penn Champions Club programming, strengthening communication and professional development within the financial services environment

Student-Athlete Investment Club | Philadelphia, PA

Jan 2026 – Present

External events committee member

- Host three speaker events and fireside chats while maintaining alumni relationships, strengthening communication, networking and event-planning skills by coordinating five finance-focused programs
- Competed in a theoretical investment competition managing \$100K in starting capital and generating 7% returns, strengthening stock-pitching, valuation, and investment analysis through hands-on portfolio management and collaborative investment discussions with peers in the markets committee of the club

SKILLS & INTERESTS

Skills: Norwegian (Native proficiency), English (Professional proficiency)

Certifications & Training: Wall Street Prep Accounting & Financial Statements Analysis

Interests: Basketball training/coaching, *Suits*, Skiing, Weightlifting, Hiking