

# Adelae J. Chierici

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## EDUCATION

### Georgetown University

*Bachelor of Science in Business Administration | Finance and Management*

Washington, DC

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.9/4.0
- **Honors/Awards:** NCAA Division I Student-Athlete (Varsity Women's Field Hockey)
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- Command Zero — *Agentic AI Security Operations Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1/75 NCAA athletes (~20%) to lead the Control Phase for a deal team of 5, synthesizing AI cybersecurity research, ARR growth metrics/acquisition precedent analysis into a client-ready investment recommendation delivered live to MS on 6/8
  - Evaluated 3 investment catalysts supporting Command Zero's positioning within AI-enabled SOC automation, analyzing 180% YoY ARR growth to \$7.5M, enterprise AI adoption trends and the \$32B Google-Wiz acquisition to assess category momentum
  - Assessed competitive and customer-concentration risks across the AI cybersecurity landscape, analyzing Command Zero's 28 enterprise customers, 45% top-customer revenue exposure/positioning against larger platforms while developing 5+ mitigants

### UPRISE Field Hockey Club

*Field Hockey Coach (Seasonal)*

Voorhees, NJ

*Jun 2022 – Present*

- Developed comprehensive training programs for 20+ athletes focused on technical skill development, teamwork and gameplay execution, strengthening player confidence & improving competitive performance outcomes through individualized coaching/support
- Coordinated 3+ weekly practices and game-strategy planning across multiple seasons, fostering stronger communication between players, parents and coaching staff while improving accountability, development progress & overall team culture for a competitive club

### Edmund Optics

*Accounting Intern*

Barrington, NJ

*Jun 2025 – Aug 2025*

- Assisted with AP/AR workflows and 25+ monthly journal entries, supporting accurate financial reporting and operational efficiency across accounting functions while strengthening familiarity with corporate accounting systems/reconciliation procedures for company
- Utilized accounting software to streamline 100+ transaction entries and improve departmental record-keeping efficiency, supporting timely financial operations/strengthening organizational accuracy through consistent reconciliation support and month-end reporting

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Georgetown University | Women's Varsity Field Hockey

*NCAA Division I Student-Athlete*

Washington, DC

*Sep 2025 – Present*

- Balance 20+ hours/week of Division I field hockey training, travel, film review and competition alongside Georgetown's rigorous academic workload, demonstrating discipline, resilience and time-management skills within a high-performance collegiate environment
- Contribute to Georgetown's Division I field hockey program through 5+ weekly practices, strength-training sessions and film analysis, strengthening communication, accountability and teamwork skills while competing for a nationally regarded college field hockey team

### Georgetown University | "Beyond the Game: The Lasting Career Benefits of College Athletics"

*Researcher*

Washington, DC

*Sep 2025 – Nov 2025*

- Examined how collegiate athletics develop workplace-relevant soft skills through a semester-long Georgetown research collaboration, analyzing 25+ research sources tied to hiring success, compensation growth and long-term professional advancement opportunities
- Analyzed peer-reviewed studies, labor-market datasets and employer perspectives to assess athletics' impact on leadership attainment and career development, synthesizing findings from 15+ sources into structured conclusions on long-term professional outcomes

### Moorestown High School

*Peer Tutor*

Moorestown, NJ

*Sep 2023 – Jun 2025*

- Developed individualized lesson plans and adapted instructional methods for 10+ students, strengthening academic engagement, comprehension/confidence while supporting collaborative learning environments across multiple coursework levels/academic subjects
- Facilitated group discussions promoting collaborative learning and critical-thinking development while mentoring 3+ junior tutors on instructional strategies, strengthening leadership, communication and peer-support skills across tutoring sessions & academic initiatives

### Moorestown Recreational Department

*Field Hockey & Lacrosse Coach Volunteer*

Moorestown, NJ

*Aug 2021 – Jun 2025*

- Developed structured practice plans and coached 25+ youth athletes on competitive techniques, gameplay fundamentals and team strategy, strengthening player confidence & sportsmanship while supporting long-term athletic development across recreational sports
- Organized team events and evaluated player performance through individualized coaching feedback and mentorship support, fostering stronger teamwork, camaraderie & communication while contributing to a positive development-focused team across multiple seasons

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Excel, 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*

**Ithaca, NY**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.6/4.0
- **Accomplishments:** NCAA Division 1 Student-Athlete (Cornell Varsity Golf) | AP Scholar with Distinction (Lynbrook High School) | AJGA Golf Scholastic All American Award | Frederick Douglass & Susan B. Anthony Award - University of Rochester
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### AFBI Macro Firm

*Incoming 2026 Hedge Fund Summer Analyst*

**New York City, NY**

*May 2026 – Aug 2026*

- Expected to analyze cross-asset macro trends, alternative datasets and quantitative trading signals across 3+ global markets, supporting portfolio managers through macroeconomic research, risk monitoring and futures/FX strategy analysis to learn more about finance

### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Apr 2026 – Jun 2026*

#### Selected Transaction Experience

- Alkami Technologies — Digital Banking SaaS Platform (Tech M&A / Strategic Advisory Simulation)
  - 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
  - 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

## 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

### FTE Economics for Leaders

*Student*

**San Jose, CA**

*May 2023 – Aug 2023*

- Completed 20+ hours of economics and leadership coursework covering labor markets, supply-demand dynamics and policy analysis, applying quantitative reasoning frameworks to evaluate macroeconomic events and strengthen analytical decision-making capabilities
- Collaborated with 15+ peers to analyze public policy and market-based case studies, synthesizing economic theory and leadership principles into structured recommendations that improved presentation skills & discussion quality during live seminars in the program
- Engaged with professors from 2+ top universities, including Wake Forest University and Columbia University, discussing economic policy and leadership frameworks that strengthened intellectual curiosity and exposure to advanced academic research environments

## NON-TECHNICAL SKILLS & INTERESTS

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

**Languages:** English (Native Proficiency) | **Organizations:** Lynbrook High School DECA

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

# Adya V. Kadam

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## EDUCATION

### University of California, Berkeley

Bachelor of Science in Electrical Engineering & Computer Science

Berkeley, CA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.66/4.0 | **SAT:** 1520
- **Honors/Awards:** 2025 NCFHA National Academic Squad, Willow Glen Education Foundation Scholarship, Valedictorian
- **Relevant Courses:** Data Structures, Structure/Interpretation of Computer Programs, Multivariable Calculus, Calculus II, Econ.
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Present

#### Selected Transaction Experience

- Stripe — Global Payments & Financial Infrastructure Platform (Tech M&A / Strategic Advisory Simulation)
  - Assessed 2 fintech precedent transactions for deal team of 5, totaling \$19B+ in enterprise value, benchmarking 9.8x–25x EV/Revenue multiples, payments infrastructure trends & international expansion dynamics to develop 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

### National Geographic

Software Engineering Consultant

Berkeley, CA

Jan 2026 – Present

- Engineer a cloud-based photo database for National Geographic Society's Pristine Seas Program, implementing SQL-driven filtering & search functionality across 1,000+ marine images to improve cataloging efficiency + long-term access to scientific data + workflows
- Design 10+ high-fidelity UI/UX wireframes in Figma for marine research platforms, optimizing navigation, usability and public-facing data presentation workflows that strengthen accessibility for scientists, researchers and broader conservation stakeholders

### Project Empower

Junior Developer

Fremont, CA

Jan 2023 – May 2025

- Developed frontend features for Project Empower initiatives, including OpenGrant and Mindly, collaborating with 5+ cross-functional volunteers to improve platform usability, accessibility and long-term engagement across student-focused educational support resources
- Built frontend filtering functionality for OpenGrant's scholarship database serving 10K+ students, enabling efficient navigation across 100+ scholarship opportunities while strengthening search accuracy and improving overall user experience performance metrics

### SPARQ Capital

Research Intern

Palo Alto, CA

Jun 2024 – Aug 2024

- Evaluated 50+ prospective startups by analyzing funding rounds, investor participation and capital-raising activity, strengthening market research and venture-screening capabilities supporting data-driven early-stage investment evaluation and sourcing processes
- Developed structured spreadsheets and investment-tracking systems for prospective portfolio companies, collaborating with experienced investors to organize market data + improve visibility into sourcing, diligence & venture pipeline management workflows

## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

### Made By Adya

Entrepreneur/Founder

San Jose, CA

Dec 2025 – Present

- Manage all operations for a custom handmade clothing business specializing in crochet and sewn apparel, completing 20+ tailored and personalized orders while strengthening client communication, product customization and small-business management capabilities

### University of California, Berkeley | Division I Field Hockey Team

Varsity Student-Athlete

Berkeley, CA

Aug 2025 – Present

- Balance 20+ hours/week of Division I field hockey training, nationwide travel and competition alongside rigorous engineering coursework, collaborating with 26 teammates to execute strategic team objectives while strengthening discipline and time management

### NorCal Impact Field Hockey Club

Part-Time Field Hockey Coach (Seasonal)

San Jose, CA

Dec 2022 – Present

- Structure training programs for 40+ field hockey athletes across varying skill levels, delivering tailored coaching, input, and feedback to athletes that strengthen technical execution, on-field teamwork & overall player confidence in competitive field hockey environments

### Web and App Development Club

Founder/President

San Jose, CA

Dec 2022 – May 2025

- Founded and led a student technology club teaching HTML, CSS and JavaScript through 10+ hands-on coding projects, mentoring members through personalized feedback and collaborative workshops that strengthened technical development/problem-solving skills

## SKILLS & INTERESTS

- **Programming Languages:** Python, HTML, CSS, Java, SQL, Scheme, JavaScript
- **Languages:** English, Spanish (California Seal of Bilingualism), Marathi
- **Interests:** Crochet, Sewing, Asian Street Food, Watercoloring, Thrifting, New York Times Games, Clash Royale

# Aleksander Nikola Nikolov

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## EDUCATION

### Columbia University

*Bachelor of Arts in Financial Economics & Applied Mathematics*

**New York, NY**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.84/4.0 | **SAT:** 1540
- **Honors/Awards:** NCAA Division I Student-Athlete, (Varsity Rowing), Dean's List (Fall 2025)
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Mar 2026 – Present*

#### Selected Transaction Experience

- Databricks — *Enterprise Data & AI 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 Databricks as a potential acquisition target while consolidating due diligence into a concise, client-ready investment thesis presented live to MS
  - Evaluated 3 core investment drivers supporting Databricks' AI-platform leadership, analyzing 65% YoY growth, 140% net revenue retention, \$5.4B+ revenue run-rate & strategic partnerships with OpenAI and Anthropic to recommend early adoption
  - Assessed hyperscaler competition risks across AWS, Azure and Google Cloud, evaluating Databricks' 20,000+ customer base, cloud-neutral architecture and Fortune 500 penetration while developing 5+ mitigants tied to switching costs & data integration

### FinancialFuture4U

*Chief Strategy Officer*

**Piedmont, CA**

*Aug 2023 – Aug 2025*

- Led financial-literacy initiatives teaching budgeting, saving, investing and credit concepts to 100+ underserved students, strengthening financial awareness and long-term money-management skills through workshops, presentations and educational outreach programs
- Coordinated financial-literacy workshops with 10+ schools through in-person and virtual presentations, delivering investing and risk-management education while strengthening communication, leadership and community-engagement skills across diverse student audiences

### Panera Bread

*Retail Team Member*

**Dublin, CA**

*Jun 2022 – Aug 2025*

- Managed 100+ high-volume customer transactions with speed and accuracy during peak service periods for three summers, strengthening multitasking, customer-service and workflow-management skills within a fast-paced retail and food-service environment
- Collaborated with 10+ team members to streamline store operations and balance shifting responsibilities during busy service hours, strengthening adaptability, teamwork and communication skills while maintaining consistent customer-service standards throughout

### Mangia Mi

*Busser & Host*

**Danville, CA**

*Feb 2021 – Apr 2022*

- Coordinated front- and back-of-house restaurant operations for 50+ guests nightly to maintain efficient service flow, strengthening organization, communication and time-management skills while supporting daily execution within a high-volume dining environment
- Served as the first point of contact for 50+ guests per shift, managing seating coordination, order accuracy and customer-service interactions while contributing to efficient restaurant operations and positive guest dining experiences during peak service hours

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Columbia Heavyweight Men's Rowing (NCAA Division I)

*NCAA Division I Student-Athlete*

**New York, NY**

*Sep 2025 – Present*

- Dedicate 35+ hours/week to Division I rowing training, travel and competition while balancing Columbia University's rigorous academic workload, strengthening discipline, time-management and organizational skills within an elite collegiate athletic environment
- Compete within Columbia's nationally competitive heavyweight rowing program, collaborating with teammates and coaches through structured training and race preparation while strengthening accountability/resilience/teamwork under high-performance expectations

### Oakland Strokes Rowing Club

*Team Captain*

**Oakland, CA**

*Jun 2024 – Jul 2025*

- Led daily warm-ups and coordinated structured practice routines for 20+ teammates, strengthening team cohesion, physical preparation for the season & accountability while fostering a disciplined and competitive training environment across multiple seasons
- Organized off-season and supplemental training initiatives to maintain team fitness and performance standards, strengthening leadership, communication and motivational skills while reinforcing long-term athletic development and competitive consistency

### Mustang Soccer Club

*Team Captain*

**Danville, CA**

*Aug 2021 – May 2023*

- Served as the primary liaison between 20+ teammates, referees and tournament officials, strengthening leadership and communication skills while supporting smooth game operations and maintaining professionalism during competitive league matches and tournaments
- Led pregame warm-ups and motivational team discussions across 15+ tournament competitions, reinforcing accountability, teamwork and mental readiness while fostering a strong culture of unity and competitive focus throughout the season and all related practices

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Google Sheets, Data Analysis, Research, Google Slides

**Interests:** Hiking, Pickleball, The Best One Yet Podcast

# 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 (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- 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

*Bachelor of Arts in Economics & Molecular and Cellular Biology*

**Baltimore, MD**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.68/4.0 | **ACT:** 34
- **Honors/Awards:** Deans List, Recruited Student-Athlete on Johns Hopkins' Fencing Team, Fencing All-American (2023–2025)
- **Relevant Courses:** Stanford Stan-X Fly-Lab, Molecular Genetics, Advanced Chemistry, Biology, Chemistry, Physics, Calculus II

## PROFESSIONAL EXPERIENCE

### Wall Street Internship Academy

*Johns Hopkins University Fellow*

**Baltimore, MD**

*Oct 2025 – Present*

- Selected for a competitive finance preparation program providing technical training, industry immersion, and mentorship, strengthening understanding of financial markets, internship recruiting processes & core Wall Street career pathways + opportunities
- Participated in the Fall 2025 NYC Wall Street Trek, visiting 5+ major financial institutions and engaging with alumni professionals to learn about investment banking, markets & buy-side career trajectories across structured firm presentations + networking discussions

### Bank of America

*MAP Investment Banking Fellow*

**Remote**

*Jan 2026 – May 2026*

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

- Omada Health — *Digital Chronic Care Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
  - Led Planning Phase market framing for Omada, synthesizing 3 macro healthcare trends including \$5.3T U.S. healthcare spend, ~8.5% projected 2026 medical cost trend & 102 health-tech M&A deals in 1H25 to strengthen the deal team's 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 2 core vulnerabilities including unproven GLP-1 partnership monetization and low current penetration while grounding projections in 2026E revenue & EBITDA benchmarks, strengthening the foundation for all future downstream work

### CCRM Fertility Clinic

*Intern*

**New York, NY**

*May 2025 – Jun 2025*

- Shadowed a board-certified endocrinologist across 10+ patient consultations and procedures, observing egg retrievals and embryo implantations to deepen understanding of clinical workflows and reproductive endocrinology treatment protocols at a fertility clinic
- Participated in follow-up consultations reviewing 3+ hormone therapy pathways and patient care plans, strengthening knowledge of fertility treatment approaches & the multidisciplinary coordination required across physician, lab & top-performing patient care teams

### University of Minnesota

*Colorectal Data Analysis Intern*

**Minneapolis, MN**

*Jun 2024 – Mar 2025*

- Extracted and synthesized data from 75+ peer-reviewed scientific papers, building study-characteristic tables and literature summaries that supported structured analysis for colorectal surgery research publications and evidence synthesis for UM's clinical research review
- Co-authored "Perioperative Nutrition Therapy to Optimize Colorectal Patient Outcomes" (publication pending, 2025), contributing research synthesis and data organization to strengthen evidence supporting improved perioperative care strategies in colorectal surgery

## LEADERSHIP & COMMUNITY DEVELOPMENT

### The Child Mind Institute

*Youth Council Member*

**New York, NY**

*Jun 2023 – Jun 2025*

- Selected as 1 of 20 youth advisors nationwide, contributing to the development of college readiness toolkits and mental health resources designed to support teens navigating academic pressure, wellbeing & transition planning across national advocacy initiatives
- Moderated 3 high-profile youth mental health panels featuring national leaders including U.S. Surgeon General Vivek Murthy, Second Gentleman Douglas Emhoff, and Olympian Maia Shibutani, facilitating discussions on student wellbeing & youth advocacy initiatives

### The Chapin School

*Health & Wellness President, Varsity Soccer Captain & Editor-in-Chief*

**New York, NY**

*Sep 2021 – Jun 2025*

- Served in 3 major leadership roles including Editor-in-Chief of *Wheel Magazine*, Health & Wellness President, and Varsity Soccer Captain, leading a 6-member editorial team, publishing a 100+ page issue & building mental-health initiatives that helped student body
- Elected 4x student representative and 2x varsity captain, restructuring student government through a new cross-school leadership council while guiding the soccer team to the NAIS semifinals & earning All-Star and Coach's Choice honors through strong leadership

### Stanford Stan-X Fly-Lab Program

*Student Researcher*

**New York, NY**

*Sep 2023 – Jun 2024*

- Engineered a novel *Drosophila* strain using Stanford's SX4 P-element, applying 6+ molecular biology techniques including DNA extraction, iPCR, gel electrophoresis, and sequencing to map enhancer control regions within a structured genetics research framework
- Authored and presented a genetics research paper detailing enhancer mapping methodologies after conducting larval dissections and antibody staining with GFP reporter lines, identifying gene regulation patterns and validating enhancer-driven expression across stages

## NON-TECHNICAL SKILLS & INTERESTS

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

**Clubs:** Alpha Phi, Smart Women Securities (SWS) analyst, AMA Nest Strategies Analyst, Investment Banking Workshop (IBW)

**Skills:** Mandarin Chinese (Conversational), CPR Certified, Microsoft Office, Google Workspace, Wall Street Prep Accounting Certification

# Anwitha Duduka

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## EDUCATION

### Amherst College

Bachelor of Arts in Economics & English

Amherst, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0 | **SAT:** 1470
- **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 (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

MAP Investment Banking Fellow; Team Captain

Remote

Mar 2026 – Present

#### Selected Transaction Experience

- 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 for children across hospitals, shelters and schools in 20 states and 4 countries, applying behavioral-science principles to build confidence, coping skills & emotional strength for underserved youth at scale
- Built partnerships with clinics, nonprofits and educators while managing budgets, production timelines and fulfillment logistics, expanding multi-state distribution capacity and creating a repeatable operating model that increased reach and program sustainability

### Private Tennis Coaching Business

Founder & Head Coach

Austin, TX

Jun 2022 – Jul 2025

- Built and operated a private coaching business serving 20+ youth tennis players, creating individualized development plans, tracking weekly progress and delivering technical instruction that improved match performance, retention and long-term client satisfaction
- Implemented pricing, scheduling and resource-allocation systems across 15+ recurring lessons, court usage and client demand, optimizing profitability and weekly capacity while maintaining consistent service quality and managing a scalable business operation

### Teens Take Initiative

Vice President

Austin, TX

Nov 2022 – May 2025

- Coordinated monthly service initiatives by sourcing 5+ nonprofit partnerships, organizing volunteer teams and executing mission-aligned events, expanding outreach capacity and increasing student participation across recurring community impact programs
- Managed donation logistics, stakeholder communication and delivery workflows for funds and essential goods across multiple drives, improving execution reliability and creating consistent opportunities for students to contribute to high-impact local service efforts

## 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 team discussions on identity, equity and belonging, improving communication, trust and mutual respect among student-athletes while strengthening culture and day-to-day collaboration
- Partner with the NCAA and 3+ campus stakeholders as team liaison to support department-wide programming and inclusion initiatives, increasing engagement + ensuring Amherst athletes feel represented, supported + connected within the broader community

### Bank of America

Investment Banking 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 interview preparation for a career in high-finance
- Competed against 654 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

### 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 routines that elevated overall team performance standards
- Produced 15+ technical highlight reels analyzing tennis match patterns, strengths and improvement areas for several teammates, translating performance data into actionable coaching insights that enhanced preparation, confidence & performance for entire team

## 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

# Avery J. Park

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## EDUCATION

### Stanford University

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

Stanford, CA

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.85/4.0
- **Awards/Accomplishments:** Stanford Women's Varsity Squash 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 (*to be completed by June 2026*)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow; Team Captain*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- 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

### Stanford Athletes in Finance

*Analyst*

Stanford, CA

*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 and long-term internship positioning strategies

### Sidecut Ventures

*Venture Capital Intern*

Remote

*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

*NCAA Student-Athlete*

Stanford, CA

*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

*Professional Development Fellow*

Remote

*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

*Podcast Co-Founder and Co-Host*

Baltimore, MD

*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

**Skills:** Python (Data structures, algorithmic problem solving)

**Languages:** German and French (Working proficiency)

# Ben N. Aronson

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## EDUCATION

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### Swarthmore College

*Bachelor of Arts in Economics & Philosophy*

**Swarthmore, PA**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 4.0/4.0 | **SAT:** 1470
- **Relevant Courses:** Introduction to Economics, Calculus, Statistics, Accounting
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

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## PROFESSIONAL EXPERIENCE

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### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Mar 2026 – Present*

#### Selected Transaction Experience

- Heidi Health — *AI Clinical Documentation & Workflow Automation 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 4+ financial data points to build a snapshot of Heidi Health's ~\$22M–\$50M revenue trajectory, margin profile and cost structure to guide analysis
  - Built 5+ exhibits evaluating revenue growth, margin expansion from ~-50% to ~-10% and key cost drivers including AI infrastructure/GTM spend, strengthening visibility into operating leverage/scalability/paths toward profitability across model
  - Assessed balance sheet strength using ~\$65M liquidity and minimal leverage assumptions while identifying 4+ KPIs including customer growth, retention and AI utilization, aligning the team around a clear, metrics-driven investment framework for MS

### Clarus Capital

*Investment Analyst*

**Swarthmore, PA**

*Oct 2025 – Present*

- Selected as 1 of 4 freshmen from 30 applicants (13%) to join a \$40K AUM long-only fund, building 3+ stock pitches and conducting financial/qualitative analysis to support investment decisions/strengthen portfolio positioning across sectors throughout the semester
- Deliver 5+ market updates and portfolio reviews, evaluating performance drivers and monitoring existing positions to inform allocation decisions, improve analytical rigor and align the team around data-driven investment recommendations in weekly meetings

### The Run House

*Sales Associate*

**Needham, MA**

*Apr 2025 – Aug 2025*

- Generated \$75K+ in summer sales by assisting 50+ customers daily, delivering tailored product recommendations that improved conversion rates, customer satisfaction & repeat business across a fast-paced retail environment during peak seasonal demand periods
- Managed inventory across 100+ SKUs and placed 10+ monthly restock orders, coordinating with team members across the store to maintain organized merchandising and consistent product availability throughout peak demand periods and high-volume sales cycles

### Sugarbush Mountain

*Ski Instructor*

**Warren, VT**

*Dec 2022 – Mar 2023*

- Taught 20+ beginner and intermediate children across group ski lessons on Sugarbush Mountain, focusing on safety, technique and confidence to improve skill development & overall on-mountain experience throughout the season across varying weather conditions
- Organized 5+ group sessions per day with students, managing lesson flow, engagement and safety protocols to ensure structured instruction and positive experiences across diverse skill levels while adapting to changing group dynamics and conditions in real time

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Swarthmore Cross Country | Track and Field

*Varsity Student-Athlete*

**Swarthmore, PA**

*Aug 2025 – Present*

- Balance 25+ hours weekly of practices, training, travel & competition alongside academics, demonstrating discipline, time management and consistent performance within a highly competitive athletic environment across rigorous in-season and off-season schedules
- Collaborate with 20+ teammates and coaches to set daily/weekly/monthly goals, track progress and maintain accountability, strengthening team culture, communication/continuous improvement across training cycles/competitive meets throughout the season

### TOPS Soccer and Basketball

*President*

**Warren, VT**

*Sep 2023 – Jun 2025*

- Led operations for a community sports program supporting 30+ students with intellectual disabilities, designing inclusive programs that improved engagement, accessibility and overall participant experience across weekly sessions throughout the academic year
- Recruited and managed 30+ volunteers while organizing 10+ practices and events, strengthening program consistency, leadership structure and community impact, leading to broad recognition through the Darrien Tan Scholarship for leadership and service

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## SKILLS & INTERESTS

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- **Skills and Language(s):** Agile Methodology, Project Management Professional (PMP) Training, Scrum
- **Programs:** Python (basic), Microsoft Excel, PowerPoint, Google Sheets, Google Docs, Google Slides
- **Interests:** Hiking, Rock Climbing, Pickleball, Golfing, Chess, Skiing, and Ultramarathons

# Benjamin H. Ohrr

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## EDUCATION

### Fordham University

Bachelor of Science in Finance

Bronx, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0
- **Awards/Accomplishments:** Woolworth Scholar Award (3.80+ GPA), EY Ground Floor Challenge Semifinalist
- **Relevant Courses:** Business Statistics, Business Calculus, Microeconomics, The Ground Floor
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)
- **Organizations:** Pre-Finance Scholars, NCAA Division I Men's Swimming, Alternate Investment Club, Ascend

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Present

#### Selected Transaction Experience

- Databricks — *Enterprise Data & AI Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1 of 75 NCAA athletes (~20%) to lead the full Execution Phase for a deal team of 5, directing valuation modeling, precedent transaction analysis and risk assessment across ~5 workstreams/week to recommend Databricks for an MS-style case
  - Analyzed 2 AI-focused precedent transactions valued at \$1.25T+ combined enterprise value, benchmarking 66x–175x EV/Revenue multiples and platform-scale acquisition rationale to strengthen Databricks valuation and long-term positioning
  - Built valuation and risk framework using 5+ institutional and industry sources, assessing AI monetization risk, GDPR exposure + competitive pressure across Databricks, Snowflake and Microsoft to support a more defensible final recommendation to MS

### Ethereal Apparel LLC

Founder & CFO

Dublin, CA

May 2021 – Sep 2025

- Founded and scaled a custom apparel brand generating \$50K+ in revenue and achieving a six-figure valuation through strategic pricing, inventory forecasting and disciplined cost management that strengthened profitability and long-term operational sustainability
- Directed end-to-end operations across product design, overseas manufacturing and fulfillment logistics, coordinating 1,000+ unit production runs that optimized turnaround times, maintained quality standards and improved gross margin performance for company
- Built and managed a fully integrated e-commerce platform supporting multiple product launches, implementing digital marketing and customer acquisition strategies that increased conversion rates, expanded brand visibility for Ethereal + drove recurring revenue growth

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Fordham University Men's Swimming (NCAA Division I)

NCAA Student-Athlete

Bronx, NY

Aug 2025 – Present

- Balance 20+ hours per week of Division I training and competition while maintaining a 4.0 GPA, demonstrating elite time management, discipline and performance consistency across demanding academic and athletic commitments at Fordham University
- Collaborate with 20+ coaches and teammates to analyze race splits, stroke efficiency and training performance data, implementing technical refinements that contribute to measurable competitive improvement and stronger scoring outcomes for the entire swim team
- Represent Fordham across collegiate competitions and team engagements throughout 5+ annual meet environments, strengthening leadership, communication and accountability skills within fast-paced and highly competitive Division I athletics settings/competitions

### Knack | Private Tutoring Service

Tutor

Bronx, NY

Jan 2026 – Present

- Provide 1-on-1 tutoring in Microeconomics and Philosophy for Fordham students across ~3 hours/week of instruction, translating complex economic models and philosophical concepts into structured explanations that improve academic comprehension/retention
- Support students through targeted exam preparation, essay development and problem-solving strategies, contributing to multiple students improving course performance to A-level standing while strengthening analytical reasoning and written communication skills
- Track weekly student progress and identify recurring knowledge gaps through ongoing performance reviews and concept reinforcement, helping students build stronger study habits and achieve more consistent long-term academic improvement and success

### Make-A-Play Foundation

Professional Development Fellow

Remote

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

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Financial Analysis, Data Analysis, Performance Analytics, Time Management, Leadership

**Languages:** Conversational Korean, Basic Spanish

**Interests:** Swimming, St. Louis Cardinals Baseball, Watch Collecting, Hiking, Film, Photography

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

# Bridget J. Chantharath

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## EDUCATION

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### 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, AP Scholar Award, 2025 District Scholar-Athlete Award
- **Relevant Courses:** Calculus-Based Intro to Statistics, Computer Science- Java
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

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## PROFESSIONAL EXPERIENCE

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### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- 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

### 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

### Door-to-Door Shipping Center

*Customer Service Representative*

Rowland Heights, CA

*Jun 2024 – Aug 2025*

- Managed incoming/outgoing mail and organized packaging systems in a boutique retail environment, strengthening operational accuracy, attention to detail and workflow efficiency while communicating with 25+ customers weekly in both Mandarin and English
- Developed bilingual customer-service experience by assisting 20+ clients weekly across shipping and logistics requests, strengthening cross-cultural communication/client relationship management/problem-solving skills in a fast-paced retail operations environment

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Columbia Women's Golf

*NCAA Varsity Student-Athlete*

New York, NY

*Aug 2025 – Present*

- Contributed to Columbia's first team tournament victory in 10+ years while helping improve 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

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## SKILLS & INTERESTS

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

# Bridget E. Egan

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## EDUCATION

### Harvard University

*Bachelor of Science in Biomedical Engineering*

**Cambridge, MA**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.4/4.0
- **Honors/Awards:** Senator Jeff Green Scholar, the Year; Girl Scouts of America: Bronze and Silver Awards
- **Relevant Courses:** Calculus, Statistics, Computer Science, Business and Behavioral Science
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)
- **Organizations:** Harvard Women's Volleyball, NCAA Division I Athlete, Jean Frazier Leadership Institute Fellow, Harvard Student Athlete Advisory Committee (SAAC), Harvard Varsity Club, Science Peer Notetaker

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Mar 2026 – Present*

#### Selected Transaction Experience

- Chai Discovery — *AI-Driven Drug Discovery Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1/75 NCAA athletes (~20%) to lead the Monitoring Phase for a 5-person deal team, synthesizing AI drug-discovery research, market trends and financial positioning into a final thesis for a prospective PE client recommending Chai Discovery
  - Evaluated ~5 investment drivers supporting Chai Discovery's AI-enabled molecular-design platform, analyzing tier-1 biopharma partnerships, accelerating AI-drug-discovery demand/embedded automation capabilities improving therapeutic research globally
  - Monitored Chai Discovery's growth trajectory and financial positioning, analyzing 2x projected biopharma VC funding expansion, zero-debt balance-sheet dynamics and revenue-scaling potential tied to increasing adoption of generative AI globally

### Alani Nu

*Communications/Promotions Ambassador*

**Cambridge, MA**

*Oct 2025 – Present*

- Promoted the Alani Nu brand across 5+ social-media campaigns, customer demonstrations and campus marketing initiatives, strengthening communication, digital-content and sales skills while contributing to brand visibility and consumer engagement efforts
- Produced and edited 10+ promotional content pieces centered on the Alani Nu product experience, strengthening creative-marketing, customer-education/social-media communication skills through hands-on brand partnership initiatives across several digital platforms

### KIVA Sports

*Talent Development Associate*

**Louisville, KY**

*Feb 2022 – Present*

- Coordinated training and in-game development for 20+ youth volleyball players, strengthening leadership, coaching and communication skills while supporting growth within a structured competitive sports environment across practices & tournament play
- Managed administrative operations, facility safety and player-intake logistics for 20+ athletes, strengthening organization, multitasking and operational-management capabilities through hands-on support of daily volleyball-program activities and team scheduling efforts

### River Road Asset Management LLC

*Institutional Asset Management Fellow*

**Louisville, KY**

*Jun 2024 – Aug 2024*

- Conducted financial-services research projects supporting 10+ charitable-giving initiatives, analyzing community-impact opportunities & potential funding targets while strengthening market-research/data-analysis skills in an institutional asset-management environment
- Completed rotational training through River Road University while engaging with the firm's women's leadership group, gaining exposure to 5+ business functions and earning recognition for contributions across operational & professional-development initiatives

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Harvard University Women's Volleyball

*NCAA Division I Student-Athlete*

**Cambridge, MA**

*Aug 2025 – Present*

- Dedicate 25+ hours/week to practices, conditioning, meetings, travel and competition, strengthening discipline, time-management and accountability skills within Harvard's nationally competitive Division I athletic environment throughout demanding in-season schedule
- Led 2+ team marketing and community-outreach initiatives, including Dig Pink Night and Youth Day, strengthening program visibility, team culture and community engagement while contributing to improved team performance & campus support throughout the season

### 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

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Microsoft Office, Word, Excel, PowerPoint, OneNote, Google Business Intelligence Program

**Interests:** Sports Photography, Travel, Technology and AI, Personal Growth, Leadership

# Camille I. Ching

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## EDUCATION

### Harvard University

*Bachelor of Arts in Statistics | Minor 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:** Introduction to Probability, Linear Algebra with Proofs, Science in the Age of Artificial Intelligence
- **In Progress:** Introduction to Statistical Inference, Vector Calculus with Proofs, Principles of Macroeconomics, Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow; Team Captain*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- 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/agent 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*

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 multiple collegiate meets each season, executing technical routines under pressure while contributing to team depth, consistent scoring opportunities and a culture of accountability, resilience and competitive excellence across the program

### Harvard Financial Analysts Club

*Member*

Cambridge, MA

*Sep 2025 – Present*

- Completed technical training in quantitative research, trading strategies, valuation models and interview preparation through weekly sessions, 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

### 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 that increased participation, accountability and progress toward annual club goals across the org.
- Tracked member progress toward recognition awards and developed personalized completion plans for peers, improving engagement, service-hour attainment and member retention while supporting stronger overall performance across a large volunteer program

## NON-TECHNICAL SKILLS & INTERESTS

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

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

**Interests:** Quantitative Finance, Artificial Intelligence, Language Learning, Travel, Knitting

# Camille S. Thai

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## EDUCATION

### Columbia University

Bachelor of Arts in Financial Economics

New York, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 3.91/4.0
- **Honors/Awards:** NCAA D1 Athlete, 2021 IMG World Championship Girls Golf, 2023 California Junior Girls State Champion
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Present

#### Selected Transaction Experience

- Vanta — Security Compliance Automation Platform (Tech M&A / Strategic Advisory Simulation)
  - Selected as 1 out of 75 NCAA athletes (~20%) to lead the full Control Phase for a deal team of 5, validating Vanta's compliance-automation investment thesis by organizing diligence findings into a final pitch book delivered live to MS on 6/8/26
  - Evaluated 3 market catalysts supporting Vanta's category leadership, analyzing \$300M+ ARR growth, 16,000+ global customers and increasing demand for AI-driven compliance automation as companies shift toward continuous monitoring infrastructure
  - Assessed competitive and scalability risks across the compliance software landscape, evaluating Vanta's product stickiness, AI-enabled automation capabilities & \$4.15B valuation while developing mitigants tied to customer integration depth/adoption

### Evergreen Professional Investments, LLC

Intern

San Jose, CA

Dec 2025 – May 2026

- Extracted key project data from 15+ architectural and construction blueprints, building comprehensive data models that enabled leadership to conduct more accurate investment evaluations, portfolio planning & asset-management decisions across several projects
- Developed centralized spreadsheets tracking project components and deliverables across multiple investments, strengthening operational visibility, portfolio monitoring and long-term asset-management efficiency through organized reporting and data-analysis

### PeakSpan Capital Growth Equity

Immersion Program Participant

New York, NY

Jan 2026 – Mar 2026

- Analyzed 25+ B2B SaaS growth strategies and operating metrics through an intensive growth-equity immersion program, strengthening foundational underwriting, market-analysis and go-to-market evaluation skills relevant to technology/software investing
- Evaluated emerging software companies by reviewing financial fundamentals and operational performance metrics, developing investment-screening capabilities and identifying high-potential opportunities across competitive technology and SaaS markets

### 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 daily pro-shop operations, organizing merchandise inventory and delivering customer-service support that strengthened operational efficiency and long-term member engagement
- Coached 10+ youth golfers through 3 weekly instructional camps, adapting drills across varying skill levels to improve technical fundamentals, player confidence and overall athletic development within a structured and competitive learning environment

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Columbia College Varsity Women's Golf

NCAA Division I Student-Athlete & Starter

New York, NY

Sep 2025 – Present

- Balance 20+ hours/week of collegiate golf training, competition and travel alongside rigorous academic coursework, demonstrating discipline, resilience and time-management skills while maintaining high performance across athletic and scholastic responsibilities
- Competed as a varsity starter in 100% of collegiate golf tournaments, contributing to a record-setting single-round team performance while strengthening competitive consistency/accountability/teamwork within Columbia's nationally competitive athletic environment

### Columbia College Women in Business

Active Member

New York, NY

Sep 2025 – Present

- Collaborated with committee members to coordinate Columbia's Annual Women's Leadership Conference, managing event logistics and professional-development initiatives supporting meaningful networking and career exploration opportunities for attendees

### Los Altos High School | Varsity Girl's Golf

Starter

Los Altos, CA

Aug 2021 – Nov 2024

- Earned 4 consecutive MVP awards and a Player of the Year distinction, demonstrating competitive consistency, leadership and strong work ethic while contributing to one of the most successful periods in program history; Mentored 10+ new first-year players per year

### Los Altos High School | Student Community Leadership

Marketing Director

Los Altos, CA

Aug 2022 – Jun 2025

- Organized 5 major fundraising and community-building events while utilizing weekly Toastmasters training to confidently present initiatives, strengthen public-speaking skills & drive participation from students/local residents; Designed 10+ social-media campaigns

## NON-TECHNICAL SKILLS & INTERESTS

**Skills and Language(s):** Chinese | **Programs:** Microsoft Word, Excel, Google Spreadsheets, PowerPoint, Procreate, Canva, Google Slides, iMovie | **Interests:** Golf, Graphic Design, Traveling, Working Out

# Celine S. Ebert

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## EDUCATION

### Johns Hopkins University

*Bachelor of Arts in Applied Mathematics and Statistics, Economics | Minor in Financial Accounting*

**Baltimore, MD**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.70/4.0 | **SAT:** 1530
- **Honors/Awards:** NCAA Student-Athlete (Johns Hopkins Women's Varsity Volleyball), UT Top Trader Highschool National Finalist (10 out of 500), Columbia University 2x National Silver Crown Award, Recipient, DECA Entrepreneurship Innovation State Finalist (10 out of 600), 4x Recipient President Volunteer Gold Service Award, Hockaday, Top Chemist (out of 150)
- **Relevant Courses:** Economics, Calculus, Financial Accounting, Foundations of American Enterprises, WSP Accounting

## PROFESSIONAL EXPERIENCE

### J&C Capital Firm

*Spring Search Fund Intern*

**Dallas, TX**

*Jan 2026 – Present*

- Responsible for supporting the acquisition process through financial due diligence under LOI, deal structure & financing, and closing

### Institute for Applied Economics

*Research Analyst*

**Baltimore, MD**

*Nov 2025 – Present*

- Selected as 1 of 7 analysts to research global monetary policy across 35 countries, applying Professor Steve Hanke's Golden Growth Rate & Credit Counterparts methods to evaluate inflation, liquidity conditions + macroeconomic stability across international markets
- Compile black-market exchange rate datasets across 20+ economies and apply purchasing power parity frameworks to estimate currency misalignment, producing quantitative analysis supporting macroeconomic research and public commentary on global issues

### Bank of America

*MAP Investment Banking Fellow*

**Remote**

*Jan 2026 – May 2026*

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

- Omada Health — *Digital Chronic Care Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
  - Collaborated on a 5-person deal team analyzing Omada Health's digital chronic care platform, evaluating competitive positioning, payer relationships, and value-based care tailwinds to frame an investment recommendation for BofA Healthcare
  - Synthesized research and team analysis into a client-style investment recommendation, presenting final conclusions on Omada's scalable platform, ~1,900 payer relationships, and chronic disease market exposure while delivering the team's Monitoring Phase

### BFS Advisory Group

*Wealth Management Intern*

**Dallas, TX**

*Jun 2025 – Aug 2025*

- Co-authored Q3 macro risk & opportunity report with the CEO analyzing U.S. equities, fixed income, and global economic trends, delivering investment insights to 430+ wealth client & supporting portfolio allocation recommendations for the firm's Q3-Q4 strategy
- Led data cleanup and migration during a firm-wide CRM transition, standardizing 8,000+ client data points, organizing 400+ financial statements, and transferring 1,000+ records into Juncture systems, improving advisor workflow efficiency and client data accessibility

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Johns Hopkins Varsity Volleyball Team

*NCAA Varsity Athlete, Starting Right Side Hitter*

**Baltimore, MD**

*Sep 2025 – Present*

- Commit 10+ hours weekly to training and competition; Started every match as a freshman right-side hitter, earning All-Conference honors (1 of 2 freshmen) while contributing to the 2025 Centennial Conference Championship & maintaining consistent performance

### Student Consulting for Nonprofit Organizations Team

*Student Consultant*

**Baltimore, MD**

*Sep 2025 – Present*

- Advised Karmic Connections on fundraising strategy and capital allocation to support mental health programs in underserved communities, developing financial sustainability frameworks and grant positioning strategies to strengthen nonprofit funding prospects
- Built a grant fundraising strategy targeting 50+ local businesses, creating pitch materials, refining value propositions for funders, and supporting a website redesign to improve donor engagement/long-term funding visibility across multiple nonprofit outreach channels

### Emporio Organization

*Founder, CEO*

**Dallas, TX**

*Jun 2021 – Present*

- Founded and scaled a global financial literacy publication reaching 1,500+ readers across 17 states and 10+ countries, recruiting 45+ staff & producing 4 annual print editions, 10 newsletters & 10 podcasts/YouTube episodes to expand access to financial education
- Distributed financial literacy resources to 5,000+ women and children nationwide, partnering with 4 local businesses and hosting 5 panels and weekly community programs, generating 200K+ media impressions & earning Columbia University's Silver Crown Award

### The Hockaday School Investment Firm

*Chief Executive Officer*

**Dallas, TX**

*Aug 2022 – May 2025*

- Served as CEO of a student-run fund overseeing an \$80K long-only endowment portfolio, leading weekly executive meetings and monthly firm-wide investment reviews with 40 members while guiding portfolio allocation decisions/evaluating student stock pitches

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Excel, Java, Python, Powerpoint, Final Accounting, Adobe Premier, Film Production, Google Collaboratory, Grant Writing

**Languages:** Spanish (Working Proficiency), German (Elementary), French (Elementary) | **Programs:** Java, C++, Python, Sequel

**Interests:** Short Film Creator, Weight Lifting, Travel Magnet Collector, Sport Highlight Creator, Podcast Enthusiast, Concerts

# Claire H. Shao

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## EDUCATION

### Harvard University

Bachelor of Arts in Economics

Cambridge, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.75/4.0 | **SAT:** 1550
- **Honors/Awards:** Student-Athlete (Varsity Tennis), Florida Virtual School Principal's Honor Roll, AP Scholar with Distinction
- **Relevant Courses:** Principles of Economics, Multivariable Calculus
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Present

#### Selected Transaction Experience

- Mercury — *Digital Banking & AI-Enabled Financial Operations Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1/75 NCAA athletes (~20%) to lead the Control Phase for a deal team of 5, validating Mercury's investment thesis by pressure-testing fintech assumptions, aligning valuation logic and refining risk-monitoring priorities for final recommendation
  - Evaluated 3 core investment catalysts supporting Mercury's growth outlook, analyzing ~30% YoY revenue expansion from \$650M - \$845M, 600-bps EBITDA margin expansion, increasing AI-driven demand for vertical fintech infrastructure platforms
  - Assessed interest-rate and business-model risks tied to Mercury's fintech strategy, analyzing partner-bank dependence, deposit-yield exposure and SaaS revenue diversification while benchmarking profitability assumptions against peers Brex/Ramp

### Manny Garcia Tennis Academy

Junior Tennis Coach

Piedmont, CA

Dec 2023 – Dec 2024

- Mentored 15+ youth tennis players through structured practices and individualized coaching strategies, strengthening technical fundamentals, engagement & development while managing equipment setup/drill stations/practice logistics across multiple skill levels
- Organized 3+ weekly training sessions for athletes across varying experience levels, adapting instructional approaches and maintaining player engagement while fostering teamwork/discipline/confidence within a productive & development-focused training environment
- Coordinated practice logistics and on-court instruction for players of different skill levels, reinforcing communication, adaptability and leadership skills while creating structured training environments focused on long-term athletic growth and performance consistency

### Learn To Be

Volunteer Tutor

Danville, CA

Jun 2024 – Oct 2024

- Delivered 35+ hours of 1-on-1 virtual tutoring in reading and math for underserved elementary students, adapting instruction methods and developing 25+ customized lesson plans that strengthened foundational literacy, numeracy and long-term confidence
- Served underserved learners through individualized mentoring and progress tracking initiatives, adjusting instructional strategies based on ongoing evaluations while reinforcing core academic concepts through personalized activities tailored to each student's needs
- Developed 25+ customized learning exercises aligned with student progress and comprehension levels, strengthening instructional planning, communication and mentorship skills while supporting long-term academic engagement across mathematics concepts

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Harvard University | Women's Varsity Tennis

NCAA Division I Student-Athlete

Cambridge, MA

Aug 2025 – Present

- Balance 20+ hours/week of Division I tennis training, travel and competition alongside Harvard's rigorous academic workload, demonstrating discipline, resilience and time-management skills while competing consistently in high-level athletic environments
- Compete within Harvard's nationally competitive Division I tennis program, collaborating with coaches and teammates through daily practices, match preparation & travel schedules while strengthening leadership, accountability and adaptability in high-pressure settings
- Contribute to a nationally competitive Division I tennis environment through daily practices, film review and match preparation, strengthening teamwork, communication and competitive consistency while balancing rigorous academics & elite athletic expectations

### 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
- Advanced to a live M&A case simulation, analyzing valuation drivers, investment risks and strategic positioning to deliver a final recommendation live to MS while strengthening technical finance, collaboration and client-communication skills under tight deadlines

## NON-TECHNICAL SKILLS & INTERESTS

**Languages:** English, Chinese

**Interests:** Hiking, crafting, baking

# Connor J. Simkiss

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## EDUCATION

### Tufts University

*B.A. in Economics, Minors in Finance, Entrepreneurship*

Medford, MA

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.81/4.0
- **Activities:** Varsity Football, Army ROTC, Economics Society, Career Development Club
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)
- **Honors & Awards:** Kyle Bernard Memorial Scholarship, Eric Knorr 3D award for Dedication, Desire and Devotion, Jumbo Pride Player of the Year, AP Scholar ('24-25), DECA Financial Literacy State Qualifier, Wall Street Prep Accounting Certification

## PROFESSIONAL EXPERIENCE

### Francisco's on the River

*Server, Busser, Host (Seasonal)*

Washington Crossing, PA

*Nov 2022 – Present*

- Orchestrate front-of-house operations during peak 150+ cover shifts, coordinating seating cadence, table turns, and service communication to optimize throughput, reduce wait times & sustain dining standards in a high-volume/revenue-sensitive environment
- Deliver consultative, menu-driven service across 40–60 guests per shift, translating product knowledge into upsell execution and repeat patronage, while maintaining service precision under time pressure to protect brand reputation and guest satisfaction

### Bank of America

*MAP Investment Banking Fellow*

Remote

*Jan 2026 – May 2026*

Selected Transaction Experience | [Pitch Book](#)

- Delcath Systems — *Oncology Drug-Delivery Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
  - Led Planning Phase for a 5-person deal team, structuring 4 healthcare macro drivers (aging demographics, VBC shift, digital health ~15–20% CAGR, capital selectivity) into an investor-ready industry thesis to frame growth durability + underwriting risk
  - Translated secular tailwinds (65+ population growth; \$4.9T U.S. spend; AI ~\$150B value pool) into a demand-backed oncology narrative, linking demographic expansion to procedural volume scaling and long-term revenue visibility for Delcath Systems
  - Integrated capital markets headwinds (VC pullback, higher cost of capital) into risk assessment, positioning Delcath's ~\$88.9M net cash balance and EBITDA inflection as differentiators supporting liquidity runway and commercialization scalability
  - Presented a 10-page investor deck, 1-page fact sheet, and DDQ live to BofA leadership (3/23/26); expected to defend underwriting assumptions across growth/margins/capital structure to strengthen deal credibility & go-forward investment thesis

### Simkiss Services

*Co-Owner & Operator*

Furlong, PA

*Nov 2020 – Aug 2025*

- Founded and scaled a residential power washing and landscaping business, managing sales, pricing, scheduling, and service execution to acquire 100+ clients and generate \$40K+ 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

*NCAA D-III Student-Athlete, Linebacker*

Medford, MA

*Sep 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 rigorous 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

*Big Brother & Youth Mentor, Somerville Neighborhood School*

Somerville, MA

*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

*MS1 Cadet and Scholarship Recipient*

Cambridge, MA

*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 Power point, Microsoft Word, Leadership, Collaboration, Critical thinking

**Interests:** Philadelphia Sports Fan, Steak Connoisseur, Car Enthusiast, Brazilian Jui Jitsu, Golfing, Skiing

# 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), Dutch Track & Field National Champions
- **Additional Coursework:** Preparatory Courses in Science and Engineering at Delft University of Technology
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (*to be completed by June 2026*)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

Remote

MAP Investment Banking Fellow; Team Captain

Mar 2026 – Present

#### Selected Transaction Experience

- Mercury — *Digital Banking & AI-Enabled Financial Operations 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 Mercury by defining its fintech platform/revenue model/customer base to guide downstream work
  - Sized Mercury's opportunity using ~\$758B AI TAM, ~\$174B software SAM and ~\$3–4B SOM, synthesizing 4+ sources to assess demand across AI automation, vertical SaaS + cloud data infrastructure, strengthening market framing + grounding thesis
  - Evaluated Mercury's positioning against 4+ peers including Brex, Ramp and Rho, analyzing differentiation in deposit-led banking, AI tooling and global founder access while identifying risks around rate sensitivity and regulation to improve strategy

### Delft University of Technology | Pre University Program

Remote

Student

Nov 2023 – May 2024

- Completed a 3-module pre-university program in science and engineering covering wind energy, prosthetics and biological chip design, building technical foundations and problem-solving skills across interdisciplinary engineering topics and project-based coursework
- Created a working hand prosthesis model using CAD and was selected for on-site work sessions in Delft, Netherlands, demonstrating strong project performance, technical initiative and readiness for advanced collaborative engineering environments abroad

### SNSM (French National Society of Sea Rescuers)

Brittany, France

Intern

Jun 2023 – Jul 2023

- Supported rescue base operations by helping install new launch rails for rescue boats, improving equipment readiness and strengthening understanding of maritime infrastructure, safety procedures and mission-critical operations in a fast-paced environment
- Assisted with design projects and participated in 1 mock rescue mission, gaining hands-on exposure to emergency response coordination, teamwork and problem-solving while contributing to preparedness efforts for active sea rescue operations

### UPenn Social Innovators Program

Remote

Participant

Mar 2023 – Jun 2023

- Completed a 12-week entrepreneurship program led by Upenn, gaining hands-on experience in venture creation, customer discovery and social impact strategy while strengthening problem-solving skills and understanding of how to launch mission-driven businesses
- Designed and marketed 1 adaptive running spike sole for athletes with minor disabilities, conducting product research and user-focused validation that earned program certification and increased knowledge of early-stage product development skills

## 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, performing in a high-level collegiate environment that builds resilience, competitive discipline and consistent execution across training and race settings each season
- Dedicate 25+ hours weekly to training, competition and recovery alongside rigorous academics, demonstrating strong time management, accountability and the ability to balance demanding athletic and academic responsibilities throughout the year

### 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-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 654 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

### Community Service Projects

Tuba City, AZ | Waco, TX

Vice President

Mar 2023 – Mar 2024

- Completed week-long service projects supporting rural communities on a Navajo ranch and Texas farm, contributing hands-on labor that strengthened local operations/community relationships/understanding of service in resource-constrained environments in 2 states
- Helped dig irrigation trenches, build field fencing and assist with planting initiatives, improving land functionality and daily productivity while developing teamwork, adaptability and a strong service mindset through physically demanding outdoor projects

## 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 R. Friend

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## EDUCATION

### Princeton University

*Bachelor of Science in Ecology and Evolutionary Biology | Minor in Judaic Studies*

Princeton, NJ

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.85/4.0 | **SAT:** 1490
- **Honors/Awards:** Varsity Athlete Medical Society, Elected Chabad Board Chair, Leadership Board Varsity Football
- **Relevant Courses:** General Chemistry 1 and 2, Molecular Biology, Spanish, Calculus 1, Writing Seminar, The Beatles
- **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

- Stripe — *Global Payments & Financial Infrastructure 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
  - 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
  - Sized Stripe's addressable market using ~\$6.3T TAM, ~\$1.4T SAM and ~\$370B+ SOM, integrating 4+ data sources to frame growth across enterprise software/cloud infrastructure/fintech, reinforcing the scalability + long-term utility of the opportunity

### Heart of Passion

*Regional Youth Leader*

New Orleans, LA

*Jul 2024 – Jul 2025*

- Planned and led a week-long experiential program for 20+ pediatric cancer patients from across the Southern U.S., creating meaningful activities and supportive experiences that strengthened confidence, connection, morale and lasting memories for participating families
- Coordinated logistics with medical staff, provided one-on-one mentorship and guided 20+ participants through New Orleans, ensuring safe execution and memorable experiences for patients and families throughout the program while balancing schedules/needs

### Wendel Heard, MD | Tulane School of Medicine

*Apprentice (Shadowing Experience, Orthopedic Surgery)*

New Orleans, LA

*Jun 2024 – Aug 2024*

- Shadowed 10+ surgeries including MCL, ACL and meniscus repairs at Tulane Hospital, observing surgical workflows, physician collaboration and patient care coordination to deepen understanding of orthopedic procedures/fast-paced clinical environments daily
- Analyzed pre-operative imaging and post-surgery recovery protocols across multiple cases, strengthening clinical reasoning and understanding throughout diagnosis, treatment planning and rehabilitation while connecting medical data to patient outcomes and care

### NIEUX Society

*Website Editor*

New Orleans, LA

*May 2023 – Aug 2023*

- Authored and edited weekly blog content as editor while managing 10+ website updates for an entrepreneurial innovation hub, refining messaging, strengthening digital consistency and improving audience engagement across community-facing online platforms
- Collaborated with 5+ startup founders to highlight emerging AI technologies and community-driven initiatives, translating complex business ideas into accessible written content that increased brand visibility & engagement across local innovation networks and events

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Princeton University Athletics Leadership

*NCAA Division 1 Student-Athlete & Quarterback | Student-Athlete Chair | Wellness Leader*

Princeton, NJ

*Aug 2025 – Present*

- Balance 20+ weekly hours of football practices, travel, lifts and film review while leading monthly Chabad events for student-athletes, serving as a trained peer mentor and partnering with university psychiatrists on wellness initiatives to strengthen campus engagement

### Powercourses

*SAT/ACT Teacher*

New Orleans, LA

*Jun 2025 – Jul 2025*

- Instructed classrooms of 20+ students on SAT and ACT content, teaching test-taking strategies and core concepts that improved confidence, engagement & readiness across diverse learning levels, improving scores by ~150 avg. points through targeted instruction

### Isidore Newman School

*Vice Chair | Club Founder | Science Fair Participant*

New Orleans, LA

*Aug 2023 – May 2025*

- Led school-wide initiatives, assemblies and student elections for a 450-student body while founding and serving as president of the Jewish Cultures Club, coordinating weekly meetings and annual events, and participating in the Greater New Orleans Science Fair

### Israel Lacrosse

*Service Volunteer*

Ashkelon, Israel

*Jan 2023 – Jan 2023*

- Facilitated environmental and cultural youth service work across 5 local public schools while captaining teams of 18+ middle and high school students in a regional tournament, strengthening leadership & cross-cultural mentorship in an international service setting

## NON-TECHNICAL SKILLS & INTERESTS

**Skills and Language(s):** Spanish fluency, Hebrew, Proficient in Excel, Public Speaking, Creative Writing, Powerpoint

**Programs:** Training the Streets, SAWL training, Agile Methodology, Project Management Professional (PMP) Training, Scrum

**Interests:** Food Journalism, Travel, Judaism, Sports, Percussion, Dogs, Sitcoms, 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, Nation Academic Squad (National Field Hockey Association)
- **Relevant Courses:** Financial Accounting, Principles of Economics, Management of Industrial and Nonprofit Organizations
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Mar 2026 – Present*

#### Selected Transaction Experience

- Mercury — *Digital Banking & AI-Enabled Financial 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 Mercury by structuring 5+ financial inputs across revenue streams/cost drivers/KPIs to create a clear framework to guide downstream work
  - Defined 5+ core KPIs for team of 5, including customer growth, retention, deposit base & monetization while identifying risks around AI adoption gaps and funding scale, enabling downstream team/s to track performance and stress-test key assumptions
  - 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

### Freelance Private Coaching

*Field Hockey Coach*

**Houston, TX**

*Jun 2021 – Aug 2025*

- 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 5+ 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

### Abientót Boutique

*Part-Time Employee*

**Houston, TX**

*Jan 2025 – Jul 2025*

- Processed 50+ daily transactions using POS systems, managing purchases, returns and exchanges while delivering high-quality customer service to enhance overall shopping experience and operational efficiency during high-traffic retail hours and weekend shifts
- Maintained organization across 100+ inventory items and storefront displays, collaborating with 3+ team members and leadership to support daily operations and ensure a consistent, visually appealing retail environment for customers and returning clientele

### 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

### Brown Business & Investment Organizations

*Active Member (Women in Business, Entrepreneurship Program & Finance Club)*

**Providence, RI**

*Sep 2025 – Present*

- Selected for 3 competitive business organizations, contributing to 10+ workshops, panels and networking events while collaborating with 5+ peers to organize corporate partnerships, speaker series & on-campus programming with Fortune 100 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

### 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 G. Wood

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## EDUCATION

### University of California, Davis

*Bachelor of Science in Chemical Engineering*

Davis, CA

*Expected Graduation: May 2029*

- **Cumulative GPA:** 4.0/4.0
- **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 (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- 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

*Education Assistant*

Kent, United Kingdom

*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

*Administrative Assistant*

West Sussex, United Kingdom

*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

*Apprentice*

West Sussex, United Kingdom

*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

*Active Member*

Davis, CA

*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

*Varsity Athlete*

Davis, CA

*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

*Prefect & Breast Cancer Game Coordinator*

West Sussex, United Kingdom

*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](mailto: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:** NCAA Division 1 Student-Athlete (Men's Crew), Eagle Scout, Recipient of Special Congressional Recognition for Eagle Scout Project, Youth National Champion (Crew), 2025, ISR NROTC-Scholarship (United States Navy, 1 of 100)
- **Relevant Courses:** Mgmt. of Industrial & Non-Profit Organizations, Multivariable Calculus, Equilibrium Rate and Structure
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 05/2026)

## PROFESSIONAL EXPERIENCE

### Bank of America

*MAP Investment Banking Fellow*

Remote

*Jan 2026 – May 2026*

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

- Omada Health — *Digital Chronic Care Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
  - 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 to exceed US Rowing and Coast Guard safety standards, 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

### Larchmont Manor Beach

*Red Cross Certified Lifeguard (Seasonal)*

Larchmont, NY

*Jun 2022 – Sep 2023*

- Supervised 250+ beach patrons per shift while maintaining continuous surveillance, leading 4 water rescues and administering first aid to ensure swimmer safety in high-risk aquatic environments during peak summer operations and crowded public beach conditions
- Assisted management in training 10+ new lifeguards on rescue procedures and safety compliance, reinforcing operational standards and being identified by leadership as a candidate for future Head Guard responsibilities during upcoming summer leadership rotations

## LEADERSHIP & COMMUNITY DEVELOPMENT

### 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 for regatta competitions

### Boy Scouts of America

*Eagle Scout*

Larchmont, NY

*May 2024 – Present*

- Led Eagle Scout service project restoring Monarch butterfly habitat by coordinating with 3+ government and environmental organizations, constructing pollinator planter infrastructure & contributing 150+ personal service hours within a 300+ 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

### RowAmerica Rye

*Varsity Oarsman*

Rye, NY

*Sep 2022 – Jun 2025*

- Committed 20+ hours weekly to rowing training while maintaining a 4.0 unweighted GPA, earning 30+ regatta medals, 1 Head of the Charles title, and contributing to 3 Youth National Championship victories while competing in elite national regatta circuits
- Led by example through 3+ additional weekly training hours focused on technique refinement and strength development, supporting teammates with technical adjustments and fostering a high-performance culture across multiple varsity boats

## NON-TECHNICAL SKILLS & INTERESTS

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

# Ethan C. Friesel

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## EDUCATION

### Johns Hopkins University | KSAS, WSE

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

**Baltimore, MD**

*Expected Graduation: June 2029*

- **Cumulative GPA:** 4.0/4.0 | **ACT:** 35
- **Honors/Awards:** Head of School List, AP Scholar with Distinction, Sociedad Honoraria Hispánica, Duff Tyler Spirit Award
- **Relevant Courses:** Financial Accounting, Elements of Macroeconomics, Elements of Microeconomics, Business Foundations
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 05/2026)

## PROFESSIONAL EXPERIENCE

### Searchlight Capital

*Incoming Private Equity Summer Analyst*

**New York, NY**

*Jun 2026 – Aug 2026*

- Joining a generalist team at a \$17B+ AUM middle-market PE firm investing across North America and Europe, preparing to support screening, diligence, and financial evaluations that strengthen clarity, structure, and analytical readiness for upcoming deal cycles
- Expected to contribute to cross-functional deal execution by assessing opportunities in telecom and media, coordinating with investment teams, and synthesizing research inputs, improving strategic insight and overall preparation for summer deal workflows

### Bank of America

*MAP Investment Banking Fellow; Team Captain*

**Remote**

*Jan 2026 – May 2026*

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

- HST Pathways — *ASC-Focused Healthcare SaaS Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
  - Led the Initiation Phase as 1/15 captains (~2%) from 654 fellows, directing a deal team of 5 through ~5 research sprints/week to evaluate HST Pathways' position as an emerging healthcare co., culminating in a live virtual presentation to BofA on 3/23/26
  - Sized Global Healthcare TAM at ~\$8.9T (2025) with 4.9% CAGR to 2030, U.S. Value-Based SAM at ~\$4.3T, and Specialty Care SOM at ~\$100B, prioritizing Healthcare Services, HealthTech, and Biomedical Tools to anchor growth durability and relevance
  - Built a company snapshot/investment thesis by modeling 97% retention, 75% gross margins, and tiered SaaS pricing (\$500–\$15K/month), benchmarking against ~5 peers (Surgical Information Systems, ModMed, and Nextech) to narrow focus

### Vertical Bridge

*Mergers and Acquisitions Summer Intern*

**Boca Raton, FL**

*Jun 2025 – Aug 2025*

- Supported the M&A group at the largest private tower company in the U.S. (17,000+ sites) by analyzing leases, financials, and operational data across two live buy-side deals, strengthening diligence rigor and data reliability for ongoing transaction decisions
- Built financial models for GLBOs and tower acquisitions and presented deal insights during investment-committee sessions, improving analytical precision, communication flow, and overall contribution to an active tower-infrastructure pipeline

### 12AM Tutoring Services

*Student Tutor*

**Boca Raton, FL**

*Jun 2023 – Aug 2025*

- Coached 3–5 students weekly across multiple subjects by developing individualized learning plans and tracking progress through 1–2 structured sessions per week, strengthening academic confidence, consistency, and sustained study habits across diverse learning needs
- Scheduled 10+ client sessions/week, managed billing, and adapted instruction for varying abilities, improving reliability, communication & overall quality of personalized academic support across recurring tutoring engagements within the local community

## LEADERSHIP & PROFESSIONAL DEVELOPMENT

### Johns Hopkins University Varsity Football

*NCAA Division III Athlete, Defensive End*

**Baltimore, MD**

*Aug 2025 – Present*

- Compete 20+ hrs/week in a Division III semifinalist program by balancing practice, film, lifts, and academics while refining technique across multi-phase training cycles, strengthening discipline, situational awareness & consistent execution in high-pressure environments

### Johns Hopkins Institute for Applied Economics

*Research Assistant, Economic Intelligence Group*

**Baltimore, MD**

*Aug 2025 – Present*

- Conduct 15+ hrs/week of research under Professor Steve Hanke by drafting monthly macro and geopolitical memoranda and producing daily market-trend briefs for an audience of 800K+, strengthening analytical clarity, communication & public-facing insights

### Johns Hopkins University Student-Athlete Advisory Committee

*Team Representative*

**Baltimore, MD**

*Aug 2025 – Present*

- Represent 700+ student-athletes across 24 varsity programs by voting on NCAA initiatives, communicating team needs, and participating in monthly meetings on mental-health resources, strengthening policy awareness, and long-term student-athlete advocacy

### Blue Jays for Baltimore

*Member*

**Baltimore, MD**

*Aug 2025 – Present*

- Volunteer with a student-led nonprofit by coordinating mentorship and athletic-based programs for underserved youth and engaging partners and philanthropic supporters to secure funding, strengthening outreach reliability, community bonds, and program visibility

## ADDITIONAL SKILLS & INTERESTS

**Skills:** Microsoft Office, Java (Intermediate), Spanish (Intermediate Conversational)

**Certifications:** Harvard College Data Science with a Focus on Visualization, Bloomberg Market Concepts

**Interests:** Arsenal Soccer, Biking, Coding, Poker, Hiking, Swimming, Traveling, Skiing, San Francisco Sports

# Ethan J. Guo

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## EDUCATION

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### Yale University

Bachelor of Arts in Applied Mathematics

New Haven, CT

Expected Graduation: May 2029

- **Cumulative GPA:** 3.87/4.0 | **SAT:** 1560
- **Honors/Awards:** Phillips Exeter Academy Highest Honors, 14x NISCA All-American, Scholastic All-American
- **Relevant Courses:** Discrete Mathematics, Multivariable Calculus, Linear Algebra, Microeconomics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

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## PROFESSIONAL EXPERIENCE

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### Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Present

#### Selected Transaction Experience

- Command Zero — *Agentic AI Security Operations Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1/75 NCAA athletes (~20%) to lead the Monitoring Phase for a 5-person deal team, synthesizing cybersecurity diligence, ARR growth trends & strategic fit analysis into a live final thesis recommending Command Zero as a target acquisition
  - Evaluated 3 investment drivers supporting Command Zero's strategic alignment with Morgan Stanley, analyzing ~72% gross margins, 64% YoY ARR growth and enterprise-security demand tied to AI-enabled digital banking infrastructure modernization
  - Monitored Command Zero's positioning within the autonomous-security software market, comparing the company's \$58M ARR scale against peers while supporting a "GO" recommendation tied to AI-cybersecurity tailwinds and distribution strengths

### DoorDash

Delivery Driver

Shrewsbury, MA

Jun 2025 – Aug 2025

- Maintained a 97% on-time delivery rate and 5-star customer-service rating by optimizing delivery routes and adapting quickly to changing demand, strengthening time-management, problem-solving & operational-efficiency independently during the busy summer
- Managed independent delivery operations during high-demand market periods, tracking expenses, resolving real-time logistical issues and allocating time efficiently to maximize productivity and customer satisfaction across daily delivery schedules and peak-order times

### Exeter Student Service Organization

Swim Instructor

Exeter, NH

Sep 2022 – Jun 2025

- Managed aquatic safety and instruction for groups of 4+ children ages 4–12, adapting coaching styles to different skill levels while strengthening leadership, communication and risk-management skills in a structured learning environment during daily swim sessions
- Collaborated with 10+ swim instructors to deliver structured lesson programming + parent progress updates, strengthening teamwork, organization and client-service skills while improving student engagement and long-term retention across multiple youth swim groups

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Yale Men's Varsity Swimming & Diving

NCAA Division I Varsity Student-Athlete

New Haven, CT

Aug 2025 – Present

- Balance a rigorous Ivy League academic workload while dedicating 20–30 hours per week to Division I swimming/diving commitments, strengthening discipline, resilience and time-management skills through intensive training, travel & national competition

### Yale Undergraduate Diversified Investments

Active Member

New Haven, CT

Aug 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

### PEA Webster Hall

Dormitory Proctor

Exeter, NH

Sep 2024 – Jun 2025

- Selected as 1 of 6 student proctors to mentor 70 dorm residents, serving as a liaison between students and administration while strengthening leadership, conflict-resolution and community-management skills within a collaborative residential-campus environment
- Managed a \$1.5K annual dormitory budget supporting 10+ community-building initiatives and student events, strengthening organizational, budgeting & event-planning skills through leadership of large-scale residential programming/dorm engagement efforts

### Phillips Exeter Varsity Swimming & Diving

Team Captain

Exeter, NH

Sep 2021 – Jun 2025

- Led daily training regimens for a 40-member varsity swimming program, fostering accountability, discipline and team culture while contributing to one of the strongest competitive performances in recent program history during several championship-caliber seasons
- Balanced demanding academics with elite athletic commitments while setting 4 New England records, 6 school records and earning 3x Team MVP honors through sustained competitive excellence/leadership within the program across multiple championship-level meets

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## SKILLS & INTERESTS

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- **Skills and Language(s):** Chinese, Excel, Canva, Javascript, Red Cross Lifeguard Certified
- **Programs:** Goldman Sachs Possibility Series, Camp Kesem
- **Interests:** Golf, Guitar, Photography

# 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*

- **Cumulative GPA:** 4.0/4.0 | **SAT:** 1530
- **Relevant Courses:** Mathematical Methods for Economic Analysis, Microeconomics, Macroeconomics (Q3), Investments (Q3)
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- Marvell Technology — *AI Infrastructure Semiconductor 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 Marvell's financial profile across 5+ inputs including revenue composition, capital structure & key KPIs to set direction for deal team of 5
  - Developed 4+ core exhibits highlighting \$8.2B FY2026 revenue, 40%+ growth and heavy data-center exposure, framing how AI infrastructure demand and custom silicon trends impact scalability, margins & overall financial performance across key segments
  - Established 5+ priority diligence areas including customer concentration, margin compression risk, leverage profile and sustainability of AI-driven growth, equipping the team to challenge assumptions & refine the investment narrative/overall thesis

### Self-Employed | Private Swim Instruction

*Private Swim Instructor*

Lafayette, CA

*May 2025 – Sep 2025*

- Built and managed a recurring client base of 10+ swimmers through referrals, coordinating schedules and payments while delivering 3+ weekly customized lessons that balanced safety with measurable skill development and strengthened client retention across summer
- Designed individualized programs for 10+ up-and-coming athletes, improving water confidence, endurance and stroke mechanics, enabling consistent full-length pool swimming while tracking progress and adjusting instruction to optimize performance & safety

### WiseBatch

*Research & Marketing Intern*

Walnut Creek, CA

*May 2024 – Aug 2024*

- Conducted outreach to 30+ colleges and sheriff offices, analyzing program structures, test strip adoption and data practices to identify gaps, strengthen targeting strategy and increase awareness of WiseBatch's harm-reduction solutions across underserved regions/areas
- Helped secure 15+ partnerships with community programs and advocacy groups by supporting research, outreach and messaging, driving adoption of fentanyl test strips and expanding access to evidence-based safety tools across multiple sites in Greater California

## LEADERSHIP & COMMUNITY DEVELOPMENT

### University of Chicago Swim Team

*Varsity Student-Athlete*

Chicago, IL

*Aug 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 3x UAA Conference Champion, 4x NCAA DIII National Finalist and 2x NCAA silver medalist honors, reflecting sustained elite performance, competitive consistency and execution under pressure at the national level across multiple championship meets

### American Cancer Society (ACS)

*Chapter Founder*

Moraga, CA

*Sep 2023 – Sep 2025*

- Founded and led a 30+ member ACS chapter, organizing 5+ outreach events and initiatives to expand community engagement, increase awareness and strengthen participation in cancer-related advocacy and fundraising efforts across the school/local community
- Coordinated 5+ campus events and served in Cancer Action Network, supporting national health initiatives and policy advocacy while managing logistics, promotion and stakeholder communication to maximize local impact and drive sustained community involvement

### Orinda Aquatics

*Varsity Student-Athlete*

Moraga, CA

*Aug 2023 – Sep 2025*

- Balanced 17+ hours weekly of training with academics while serving as dryland captain, mentoring 10+ younger athletes and strengthening team accountability, communication and performance across practices and competitions throughout demanding cycles
- Achieved 5+ elite honors including Speedo Summer Nationals Finalist, Toyota US Open qualifier and multiple championship titles, demonstrating consistent high-level performance across regional and national competitions against highly ranked swimmers statewide

### East Bay Sea Serpents

*Volunteer Coach*

Walnut Creek, CA

*Jun 2024 – Jun 2025*

- Coached 15+ special needs athletes, adapting instruction to varying abilities while maintaining safety, improving engagement and supporting skill development across multiple training sessions through patient communication and personalized coaching approaches
- Helped manage weekly practices for 80+ athletes, coordinating with 5+ coaches to optimize session structure, improve operational efficiency & deliver consistent, high-quality programming across the team while maintaining organized practices + athlete engagement

## NON-TECHNICAL SKILLS & INTERESTS

**Skills and Language(s):** Python Fundamentals, Excel, PowerPoint, Adaptability, Strategic Thinking, Client Communication

**Programs:** Quantum Business, Innovation, and Technology (QUBIT) | **Interests:** Piano, philosophy, astronomy, swimming, tea culture

# Fredrik Sadjak

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## EDUCATION

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### Princeton University

*Bachelor of Arts in Economics | Intended Minor in Finance*

Princeton, NJ

*Expected Graduation: May 2029*

- **Cumulative GPA:** 4.0/4.0
- **Honors/Awards:** NCAA Division I Student-Athlete (Men's Varsity Soccer)
- **Relevant Courses:** Microeconomics, Mathematical Methods for Economists, Political Game Theory
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

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## PROFESSIONAL EXPERIENCE

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### Thi Investments

*Incoming Private Equity Intern*

Stuttgart, Germany

*Jun 2026 – Aug 2026*

- Expected to analyze European mid-market investment opportunities across multiple sectors through financial modeling, acquisition evaluation and value-creation analysis supporting investment decisions, strategic initiatives and potential portfolio exits for Summer '26

### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- Chai Discovery — *AI-Driven Drug Discovery Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1/75 NCAA athletes (~20%) to lead the full Execution Phase for a deal team of 5, developing valuation frameworks transaction benchmarking/downside-risk analysis across ~20 deliverables to recommend Chai Discovery as an acquisition target
  - Researched 5+ AI-biotech mergers, funding rounds and public market comparables, evaluating revenue ramp assumptions, cash-burn trajectories + commercialization timelines across Recursion, Schrödinger & Exscientia to reinforce investment thesis
  - Synthesized insights from 15+ biotech, capital markets and institutional research sources, analyzing competitive positioning, drug-development scalability/break-even sensitivity scenarios to strengthen conviction behind the team's final recommendation

### Benten Capital

*M&A Intern*

Stuttgart, Germany

*Dec 2025 – Jan 2026*

- Supported 2 live sell-side M&A transactions across infrastructure and technology sectors, conducting domestic and international market research, investor analysis & competitive benchmarking that strengthened transaction positioning + buyer outreach preparation
- Built financial analyses and contributed to investor materials, management presentations and information memoranda across multiple client mandates, partnering directly with senior deal teams to improve workshop execution and overall transaction-readiness quality

### Dr. Maier + Partner

*Research & Consulting Intern*

Stuttgart, Germany

*Jun 2025 – Jul 2025*

- Supported national and international executive search mandates through structured company research, candidate sourcing and target-list development across 20+ organizations, strengthening consultant outreach efficiency/executive talent identification processes
- Executed candidate screening, outreach and initial interview processes across multiple recruiting workstreams, preparing shortlists and structured documentation that improved communication transparency and supported higher-quality client recommendation decisions

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Princeton Varsity Men's Soccer

*Varsity Student-Athlete*

Princeton, NJ

*Sep 2025 – Present*

- Contributed to Princeton's 2025 Ivy League Regular Season and Tournament Championship teams, appearing in 16 of 19 NCAA D1 matches while strengthening consistency, accountability and execution within high-pressure competitive environments at Princeton
- Earned All-American Team of the Week honors in Oct. 2025 while balancing 25+ hours/week of Division I training, travel and competition alongside a full academic workload, demonstrating strong discipline/sustained high-performance throughout the season

### Princeton University Real Estate Club

*Active Member*

Princeton, NJ

*Sep 2025 – Present*

- Participate in recurring member meetings and alumni presentations featuring professionals from 5+ real estate firms, strengthening industry knowledge, networking capabilities and exposure to investment, acquisitions and development-focused career pathways

### Athletes in Action

*Active Member*

Princeton, NJ

*Sep 2025 – Present*

- Participate in weekly leadership and community-building meetings alongside 10+ Princeton varsity athletes, fostering accountability, collaboration and peer mentorship through shared discussions around athletics, academics and long-term personal development
- Contribute to team bonding activities and experience-sharing sessions across multiple athletic programs, strengthening interpersonal communication, relationship-building and leadership skills within Princeton's broader student-athlete and campus community

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## SKILLS & INTERESTS

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- **Language(s):** German, English
- **Skills:** Microsoft Office, AI, Data Analysis
- **Interests:** Bundesliga, Skiing, Cooking, Arsenal FC, VfB Stuttgart

# Grace J. Ker

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## EDUCATION

### Stanford University

*Bachelor of Science in Management Science & Engineering*

Stanford, CA

*Expected Graduation: May 2029*

- **Cumulative GPA:** 4.064/4.0 | **SAT:** 1520
- **Awards/Publications:** NCAA Division I Student-Athlete (Varsity Fencing), President's Volunteer Service Silver Award, Before Chemotherapy- Journal of Adolescent Health (Volume 73, Issue 1), Gold medalist in World Cup Cadet Team Event (2023)
- **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

- Cursor — *AI-Native Developer Tools 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 Cursor's competitive positioning against 4+ platforms including GitHub Copilot and Replit, assessing differentiation, execution risks & scalability challenges while developing mitigation strategies that improved team's long-term thesis defensibility
  - Sized market opportunity using ~\$1.76T TAM, ~\$393B–\$2T+ AI SAM and ~\$500M SOM, synthesizing 3+ sources to evaluate growth drivers, adoption trends and cost constraints, strengthening clarity + grounding the investment thesis in real assumptions

### Charles R. Blyth Fund

*Analyst*

Stanford, CA

*Jan 2026 – Present*

- Perform stock research and financial analysis across the industrials and materials sectors for an investment fund managing ~\$270K AUM, generating actionable insights that strengthen security selection, portfolio positioning and long-term capital allocation decisions
- Participate in weekly pitch meetings to recommend increase, hold or exit decisions, including presenting AeroVironment with competitive and sector analysis that improved overall discussion quality and evidence-based decision-making across portfolio reviews

### Nanoseed Foundation

*Operations Associate*

Remote | Hunan, China

*Nov 2023 – Feb 2024*

- Interviewed 30+ low-income individuals in Hunan, China to evaluate business experience, growth potential and repayment readiness, selecting 5 entrepreneurs for \$1K-\$2K microloans that advanced self-sufficiency & expanded access to small-business opportunities
- Structured business plans with timelines, budgeting and revenue forecasts while researching demand, vendor options and pricing strategies, protecting early-stage margins and increasing confidence in sustainable long-term loan repayment outcomes/opportunities

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Stanford Varsity Fencing

*NCAA Division I Student-Athlete; Starting Team Member*

Stanford, CA

*Sep 2025 – Present*

- Dedicate 20+ hours weekly to rigorous training, competition and full-time academics, demonstrating elite time management, resilience and consistent performance under pressure within a high-achieving Division I environment across practices, travel and preparation
- Finished the regular season with the highest power ranking in the Western Region across 10+ matches, delivering reliable results in lineup competition that strengthened team seeding, dual-meet success and Stanford's overall competitive standing throughout the year

### Stanford Athletes in Finance

*Analyst*

Stanford, CA

*Sep 2025 – Present*

- Built practice valuation models from 10-K and 10-Q filings across 5+ companies, comparing trading multiples and financial performance to strengthen technical fluency and overall level of preparation for competitive finance/banking recruiting opportunities
- Engage in weekly analyst sessions covering financial statement analysis, valuation methods and current market themes, applying lessons through case discussions that improved investment judgment, communication skills and confidence in technical interviews

### Bank of America

*Investment Banking 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 interview preparation for a career in high-finance

### Berkeley Business Academy for Youth

*Entrepreneurship Program Participant*

Berkeley, CA

*Jul 2023 – Aug 2023*

- Developed a startup concept for an AI-gamified learning assistant targeting students ages 14-24, conducting market research and 10+ user interviews that validated demand, refined product positioning and strengthened entrepreneurial problem-solving skills
- Built a financial model featuring subscription and ad-based revenue streams with a \$1M valuation while designing core features like rewards, leaderboards and LMS integration, deepening understanding of startup economics, product strategy and investor expectations

## NON-TECHNICAL SKILLS & INTERESTS

**Skills/Language(s):** Python, Customer Service, Communication, Project Planning, Fluent in Chinese

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

**Other Programs:** Stanford Women in Business, Stanford Women in Finance, Yale Young Global Scholars (2024)

# Gracia R.E. Chua

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## EDUCATION

### Stanford University

Bachelor of Arts in Economics

Stanford, CA

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0 | **IBPD:** 45/45 AA (<1% globally)
- **Honors/Awards:** Government of Singapore Investment Corporation (GIC) Full-Ride University Scholarship (2025-2029): 1 of 4 nationwide, Stanford University Athletic Scholarship (2025-2029), Prime Minister's Award for Outstanding Achievement (2025)
- **Organizations:** Division 1 Stanford Squash Student-Athlete, The Charles R. Blyth Fund Analyst, Stanford Abundance Fellow
- **Relevant Courses:** Financial Markets, Econometrics, Accounting, Data Science, C++, Macroeconomics

## PROFESSIONAL EXPERIENCE

### Charles R. Blyth Fund

Student Analyst

Stanford, CA

Sep 2025 – Present

- Built DCF, comps, and sensitivity valuation models analyzing 5+ public equities, translating financial statements and multiple industry trends into structured investment theses that supported buy/sell recommendations for a six-figure student-run portfolio at Stanford
- Evaluated 3–4 investment opportunities per quarter through financial modeling, competitive analysis, and risk scenario testing, strengthening conviction in portfolio positioning while presenting recommendations and defending assumptions before the committee

### Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – May 2026

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

- HST Pathways — *ASC-Focused Healthcare SaaS Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
  - Ranked in the top 12% (75/654) of a national IB fellowship for NCAA athletes, analyzing 5–7 emerging healthcare companies and synthesizing 10+ project deliverables into a BofAA-style pitch deck and 1-page fact sheet against a 5-week project deadline
  - Built Execution Phase financial model translating strategy into quantitative analysis, constructing 5-year operating projections & full 3-statement model (IS, BS, CFS) with sensitivity testing across key assumptions, creating the analytical foundation for team
  - Modeled HST Pathway's ASC software growth trajectory using penetration, pricing, and upsell drivers to test sustainability of ~28% projected revenue CAGR, linking industry structure, switching costs + expansion strategy to long-term revenue outcome
  - Evaluated 3 execution risks including duopoly disruption, TAM saturation, and healthcare regulatory exposure while outlining mitigation strategies such as module expansion, international ASC entry, and scalable SaaS compliance updates for final thesis

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Stanford University, Division I Varsity Squash Team

NCAA Division 1 Student-Athlete

Stanford, CA

Aug 2025 – Present

- Compete on a Top-3 nationally ranked NCAA Division I squash team, balancing high-performance training and travel while contributing to team preparation, match execution & competitive results in collegiate tournament play against nationally ranked teams
- Maintain a 4.0 GPA while managing 20+ hours/week of training, conditioning, and competition, demonstrating discipline, time management, and resilience required to perform at an elite academic/athletic level within Stanford's demanding academic environment

### People's Action Party

Interviewer and Writer at Meet the People Sessions

Singapore

Jan 2022 – Sep 2025

- Interviewed 100+ residents facing complex personal, financial, and legal challenges, synthesizing unstructured case information into clear written briefs supporting elected officials' case evaluation and constituent assistance efforts during weekly feedback sessions
- Drafted structured case summaries and follow-up documentation translating resident concerns into actionable requests, strengthening communication between constituents, government agencies, and policymakers during weekly public service sessions across Singapore

### Singapore National Squash Association

Athlete, National Team Captain

Singapore

Aug 2016 – Aug 2025

- Represented Singapore in international squash competitions, achieving Top 25 globally at the U19 World Junior Individual Championships, 11th at the World Junior Team Championships, and 1st at the Singapore Professional Squash Satellite Open, et al.
- Sustained elite national performance as a 4× National Girls U19 Champion and 3× National Women's Open Runner-Up, demonstrating long-term competitive excellence while serving as national team captain + leading teammates through international play

### Anglo-Chinese School (Independent), Student Council

Chairperson of 2024 ACSplash

Singapore

Mar 2023 – Jun 2024

- Led end-to-end planning and execution of ACSplash, a 2,500-attendee school-wide event, managing a \$6K operating budget, coordinating cross-functional student teams, and delivering a program recognized by school leadership as the most well-executed event
- Directed 20+ student volunteers across logistics, programming, and communications workstreams, building operational timelines and vendor coordination processes that ensured seamless event delivery and high participation across the school community

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** English (Native), Chinese (Native), Python, Microsoft 365

**Interests:** Musicals, Organising Treasure Hunts, Neuroscience of Cognition and Neurological Disorders, Public Policy, Paradoxes and Dualities across Disciplines | **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 05/2026)

# Grant M. Schroder

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## EDUCATION

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### Harvard University

*Bachelor of Arts in Economics*

Cambridge, MA

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.58/4.0 | **SAT:** 1330
- **Honors/Awards:** Harvard Men's Cross Country & Track Student-Athlete (Top-7 Runner, NCAA Championship Participant); Top 10% of Graduating Class; AP Scholar; National Honor Society (Gr. 11–12); 3× All-Conference, 2× All-State, 2024 Illinois XC State Runner-Up, Nike Cross Nationals Participant (3×, #24 National Finish 2024); 4×800m Illinois National Champion
- **Relevant Coursework:** Econ 10A • Stats 104 • Expos 10 • Spanish 10 • Wall Street Prep Accounting & Financial Statements

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## PROFESSIONAL EXPERIENCE

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### Bank of America

*MAP Investment Banking Fellow*

Remote

*Jan 2026 – May 2026*

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

- 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 healthtech M&A activity while evaluating payer concentration risk and proposing diversification through enterprise contracts, strengthening downside visibility for BofA

### 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

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### 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 3.58), contributing as a top-7 freshman runner and competing in all regular-season meets and the NCAA National Championship meet
- Manage 20+ 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

### 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

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## SKILLS & INTERESTS

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**Languages:** English, primary | Spanish, secondary

**Interests:** Travel: Deep desire to learn about other cultures and seeing different landscapes. Traveled to 15+ US States (and counting!), Paris 2024 Olympics, England, Canada, Mexico, & Greece. I hope to study in London in the summer of 2026.

# Hayden K. Hayes

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## EDUCATION

### University of Chicago

*Bachelor of Arts in Business Economics | Minor in Cognitive Science*

Chicago, IL

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.5/4.0 | **ACT:** 33
- **Honors & Awards:** Student-Athlete & Quarterback (Football), Trott Emerging Business Leader (selective leadership program, 2025-Present), AICE Diploma Recipient (advanced academic curriculum), Graduated Top 1% at Seabreeze High School (3/373)
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- Databricks — *Enterprise Data & AI Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1/75 NCAA athletes (~20%) to lead the Monitoring Phase of an MS-style case, evaluating 3+ value creation levers + delivering a 1-page memo assessing strategic fit, portfolio alignment and long-term impact to translate analysis into clear insights
  - Quantified 3+ synergy drivers including revenue uplift of +15–20% over 2–3 years, analyzing operational, financial and strategic benefits to validate assumptions, strengthen the team's thesis & align the acquisition of Databricks with our PE client's portfolio
  - Synthesized 4+ data sources into a concise board memo, assessing competitive positioning, exit pathways and execution risks while stress-testing assumptions to improve rigor, highlight downside scenarios and ensure durability of long-term value creation

### Auto Works of Ormond

*Business Operations Assistant & Data Support Associate*

Ormond Beach, FL

*Jan 2024 – Present*

- Supported daily operations for an automotive-service business by assisting 30+ customers per day, resolving service issues and strengthening customer satisfaction through responsive communication & workflow coordination in a fast-paced service environment
- Coordinated 20+ weekly service requests between customers and technicians while tracking transaction trends and recurring service issues, supporting process-improvement initiatives that strengthened scheduling efficiency, organization & overall customer experience

## LEADERSHIP & COMMUNITY DEVELOPMENT

### University of Chicago | Varsity Football Team

*Student-Athlete & Quarterback*

Chicago, IL

*Aug 2025 – Present*

- Compete as a collegiate quarterback while balancing rigorous academics with high-level athletic commitments, strengthening leadership, discipline and decision-making skills through year-round training, competition and team preparation responsibilities
- Dedicate 25+ hours/week to quarterback training, film study and team activities within the University of Chicago football program, strengthening accountability, resilience and communication skills in a nationally competitive collegiate athletic environment

### Summer Quarterback Training

*Founder*

Ormond Beach, FL

*Jan 2024 – Present*

- Founded and led a youth quarterback-training program delivering individualized coaching, technical drills and leadership development for 15+ athletes while strengthening entrepreneurship, mentorship and program-management skills through athletic instruction
- Organized training schedules, participant engagement and local promotion for a quarterback-development program serving 15+ youth athletes, strengthening communication, operational-planning and client-management skills while fostering long-term athletic growth

### National Honor Society

*Treasurer*

Ormond Beach, FL

*Aug 2021 – May 2025*

- Maintained academic excellence while serving in a leadership role for National Honor Society, organizing ~10 service initiatives and supporting strategic planning efforts tied to community outreach/student-engagement programming across multiple school activities
- Tutored 15+ students in history and mathematics while collaborating with peers on community-service initiatives, strengthening mentorship, communication & leadership skills through academic-support/volunteer-driven outreach programs serving those in need

### Seabreeze High School | Varsity Football Team

*2x Team Captain*

Ormond Beach, FL

*Aug 2023 – Dec 2024*

- Served as a 4-year varsity starting quarterback and 2x Team Captain, strengthening leadership and competitive decision-making skills while leading team performance and maintaining consistent accountability on/off the field throughout multiple playoff-caliber seasons
- Set 9 school records and ranked as Florida's #1 quarterback statistically during senior year, earning All-Area Player of the Year and 2x First Team All-Area recognition through high-level athletic performance, leadership and sustained competitive excellence statewide

### Beachside Elementary Mentorship Program

*Co-Founder*

Ormond Beach, FL

*Jan 2024 – May 2024*

- Co-founded a mentorship initiative connecting 15+ high-school students with underserved elementary students, coordinating weekly sessions and mentor recruitment efforts while strengthening academic support, leadership and community-engagement initiatives
- Collaborated with school staff and 10+ student mentors to structure mentorship programming aligned with student-development needs, strengthening organization, communication and relationship-building skills while fostering confidence & accountability with all

## NON-TECHNICAL SKILLS & INTERESTS

**Skills & Language(s):** Leadership and Team Management, Event Planning and Program, Coordination, Communication and Public Speaking, Spanish (Seal of Bilingual) | **Interests:** Football, Youth Mentorship, Community Service, Athletic Training

# 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:** 3.32/4.0 | **ACT:** 33
- **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 (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Mar 2026 – Present*

#### Selected Transaction Experience

- 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

### 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

### Dog Services

*Self-Employed Trainer (Seasonal)*

**Fort Collins, CO**

*Apr 2020 – Present*

- Provided training and behavioral support services for 15+ neighborhood dogs, strengthening communication, adaptability and client-service skills while tailoring care approaches to different breeds, temperaments and long-term developmental needs for each dog
- Managed all aspects of dog care for 2 months while owners were out of state or away, including grooming, feeding and daily supervision for hypoallergenic breeds requiring specialized maintenance and consistent attention to health/safety routine care practices

### Dartmouth Joint Science Education Project

*Research Assistant*

**Hanover, NH**

*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

### American Red Cross

*Member*

**Baltimore, MD**

*Aug 2025 – Present*

- Volunteered at 5+ blood drives supporting donor registration and participant comfort, strengthening communication and community-service skills while contributing to healthcare-focused outreach and operational support initiatives across local events
- Earned CPR certification through American Red Cross emergency-response training, strengthening preparedness, teamwork and crisis-management capabilities applicable to 10+ medical-support/community-service environments during volunteer/outreach efforts

### 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

### 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

# Jeffrey A. Brunner

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## EDUCATION

### Emory University

*Bachelor of Arts in Economics (Intended) | Pre-BBA Track*

**Atlanta, GA**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.74/4.0 | **SAT:** 1500
- **Awards/Honors:** AP Scholar with Distinction, AP Capstone Diploma
- **Relevant Courses:** ECON 101, ECON 112, MATH 111, ACT 200, BUS 350, BUS 290
- **Organizations:** Varsity Track and Field, Economic Student Society, Short Term Investment Group
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Mar 2026 – Present*

#### Selected Transaction Experience

- Databricks — *Enterprise Data & AI Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1/75 NCAA athletes (~20%) to lead the Execution Phase for a 5-person deal team, structuring valuation analysis, precedent transactions and operational risk frameworks across ~5 weekly deliverables to recommend Databricks to MS bankers
  - Assessed 2 cloud and AI infrastructure acquisitions totaling \$43B in enterprise value, analyzing 10x–50x EV/Revenue multiples, strategic synergies & enterprise data-platform demand to strengthen Databricks' positioning + target acquisition-thesis support
  - Produced financial and regulatory analysis using 5+ institutional and capital markets sources, evaluating profitability timing, EU AI compliance risk and competitive pressure across Databricks/Snowflake/Palantir to strengthen team's final recommendation

### Chiffles Chips

*Intern*

**Miami, FL**

*Jun 2024 – Aug 2024*

- Worked 8+ hours daily across production, marketing and sales operations, gaining hands-on exposure to product distribution workflows and brand-positioning strategy while strengthening understanding of consumer business operations + supply-chain process
- Assisted with inventory tracking and distribution planning for \$50K+ of product, supporting operational organization and logistics coordination efforts that improved visibility into inventory management and fulfillment decision-making processes company-wide
- Participated in weekly marketing strategy meetings focused on packaging design and social media campaigns, contributing creative ideas and customer-engagement insights that strengthened product imagery and broader consumer-facing brand-development efforts

### Lil Abner Foundation

*Volunteer Tutor*

**Miami, FL**

*Aug 2021 – Jun 2024*

- Delivered 1-on-1 tutoring sessions across math, English and science for underserved students, adapting lesson plans and learning strategies that strengthened classroom engagement and long-term academic confidence across multiple subject areas and grade levels
- Tutored 10+ students weekly through personalized 1–2 hour sessions, tailoring teaching methods to different learning styles & approaches while improving subject comprehension/strengthening long-term academic performance across core academic disciplines
- Built strong relationships with students and families through consistent mentorship and academic support, contributing to the foundation's mission of expanding educational opportunities and improving long-term community engagement for underserved youth

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Emory University | Short Term Investment Group

*Founding Member*

**Atlanta, GA**

*Oct 2025 – Present*

- Co-founded a student investment organization focused on trading strategies and market analysis, helping recruit 30+ members and supporting efforts toward official university recognition through targeted outreach efforts and organizational development initiatives
- Collaborate with founding members to structure long-term organizational goals, recruit professional speakers as guests and develop recurring investment discussions, strengthening leadership, teamwork & foundational exposure to trading/portfolio strategy concepts

### Emory University | Varsity Track and Field

*NCAA Student-Athlete*

**Atlanta, GA**

*Aug 2025 – Present*

- Balance 15+ hours/week of Division III sprint training, weightlifting and team workouts alongside a full academic schedule, maintaining discipline, resilience and accountability while remaining actively involved with the team throughout injury recovery process
- Work with coaches and teammates to improve sprint mechanics, conditioning and practice execution through daily training sessions, supporting team operations and strengthening communication and collaboration within competitive collegiate athletics environments

### Make-A-Play Foundation

*Professional Development Fellow*

**Remote**

*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

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** PowerPoint, Excel, R | **Languages:** English (Native), Spanish (Conversational)

**Interests:** Soccer, Golf, Formula One, Football, Music, Traveling

# Joachim R. Johnson

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## EDUCATION

### Harvard University

*Bachelor of Arts in Applied Mathematics & Economics*

Cambridge, MA

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.56/4.0 | **SAT:** 1340
- **Honors/Awards:** Black Men's Forum, Harvard Men's Track & Field
- **Relevant Coursework:** Calculus I & II, Intro to Microeconomics, Wall Street Prep Accounting & Financial Statement Analysis

## PROFESSIONAL EXPERIENCE

### Harvard Athletics

*Event Staff Member*

Cambridge, MA

*Sep 2025 – Present*

- Support live rugby and basketball operations by managing ball retrieval, floor resets, and on-site logistics across 10+ weekly shifts, strengthening event flow, athlete safety, and the consistency needed to keep high-traffic competitions running smoothly and efficiently
- Coordinate game logistics with 5–8 staff members per event by monitoring sideline activity, resolving real-time issues, and ensuring equipment and machines remain clean, improving operational reliability and the overall quality of Harvard's athletic event experience

### Bank of America

*MAP Investment Banking Fellow; Team Captain*

Remote

*Jan 2026 – May 2026*

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

- Komodo Health — *Healthcare Data & Analytics 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 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

### Excel at Episcopal Academy

*Summer Camp Counselor*

Newtown Square, PA

*Jun 2024 – Aug 2025*

- Supervised groups of 15–20 children during outdoor sports, rotations, and sign-in/out procedures while serving as a primary parent contact, strengthening safety, communication clarity & the execution of daily tasks/deliverables/programming across camp operations
- Led sports and recreational activities across 10+ weekly blocks by coordinating games, encouraging teamwork, and resolving interpersonal challenges, enhancing the group's overall engagement, confidence & the overall quality of each camper's daily experience

## LEADERSHIP & PROFESSIONAL DEVELOPMENT

### Harvard Men's Track & Field

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

Cambridge, MA

*Sep 2025 – Present*

- Compete year-round as a Division I high and triple jumper while ranking #5 on Harvard's all-time indoor list, balancing 20+ weekly training hours with academics to strengthen discipline, performance consistency & long-term athletic development on the track team
- Execute strength, plyometric, and technical sessions across multi-phase training cycles by tracking 5+ jump metrics and refining form with coaches, enhancing precision, competitive readiness, and the long-term sustainability of performance progression year over year

### Harvard Black Men's Forum

*Member*

Cambridge, MA

*Sep 2025 – Present*

- Participate in weekly Black Men's Forum (BMF) programming focused on identity, leadership, and community development while contributing to 5+ dialogue-based events, strengthening cultural awareness, peer connection, and reflective personal growth at Harvard
- 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 for younger students

### 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 for track & field
- 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 a diverse set of users globally

### 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 consistently high-performing varsity track & field program year-round
- 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 year after year

## ADDITIONAL SKILLS & INTERESTS

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

**Interests:** Stock and Futures Trading, Mentorship/Youth Development, Formula 1, NFL, NBA, Track, Biomechanics

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

# John R. Dale

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## EDUCATION

### Carnegie Mellon University

*Bachelor of Science in Business Administration*

**Pittsburgh, PA**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 4.0/4.0
- **Honors/Awards:** NCAA Football, Financial Analyst Student Training (FAST), Alpha Sigma Phi Fraternity
- **Relevant Courses:** Finance, Accounting, Business Computing, Micro/Macroeconomics, Calculus 1-3, Business Science, Statistics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Mar 2026 – Present*

#### Selected Transaction Experience

- Alkami Technologies — Digital Banking SaaS 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 company research, financial modeling and investment analysis into a final recommendation evaluating Alkami's long-term suitability for a PE client
  - Evaluated ~5 investment drivers supporting Alkami's digital-banking positioning, analyzing recurring SaaS revenue, AI-enabled engagement tools, expanding EBITDA margins + growing demand for cloud-native banking infrastructure across regional peers
  - Assessed long-term growth durability across Alkami's fintech platform, monitoring revenue visibility, margin expansion and balance-sheet risk while supporting a final "Go" recommendation tied to scalable SaaS economics/secular cloud-banking trends

### Financial Analyst Student Training (FAST) Club

*Analyst Trainee*

**Pittsburgh, PA**

*Sep 2025 – Present*

- Trained in core investment-banking and financial-analysis concepts through FAST Club programming, strengthening technical interview preparation, valuation knowledge and professional communication skills relevant to competitive finance recruiting processes
- Participated in 10+ networking events, mock interviews and recruiting workshops, strengthening industry awareness, professional poise and relationship-building skills while gaining exposure to investment-banking career pathways and recruiting expectations

### Investment Banking Virtual Programs on Forage (Citi Bank, Bank of America, J.P. Morgan)

*Virtual Analyst*

**Remote**

*Jan 2026 – Feb 2026*

- Completed 3 investment-banking simulation programs for Citi, Bank of America and J.P. Morgan, building DCF models, company profiles and valuation analyses to assess acquisition targets and support strategic investment recommendations across live M&A cases
- Developed 5-year financial projections, sensitivity analyses and comparative-company valuations while adjusting DCF assumptions for competitor bids, strengthening analytical, modeling & client-communication capabilities through simulated deal processes/transactions

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Carnegie Mellon Varsity Football

*NCAA Division III Student-Athlete & Outside Linebacker*

**Pittsburgh, PA**

*Sep 2025 – Present*

- Commit 40+ hours/week to Division III football training, film study, travel and conditioning while balancing Carnegie Mellon's rigorous academic workload and strengthening discipline/resilience/time-management skills in a nationally competitive environment
- Participate in 5+ weekly weightlifting and conditioning sessions to stay prepared for collegiate competition, building endurance, discipline and consistency through year-round training alongside teammates and coaching staff during demanding in-season schedules

### Alpha Sigma Phi Fraternity

*Member*

**Pittsburgh, PA**

*Sep 2025 – Present*

- Coordinated with 50+ fraternity members to organize large-scale social and community events, strengthening teamwork, operational-planning and leadership skills while enhancing campus engagement and organizational participation initiatives

### Light House Pools

*Lifeguard*

**Chevy Chase, MD**

*May 2023 – Present*

- Worked 15–20 hours/week during summer seasons ensuring swimmer safety, pool maintenance and member communication, strengthening responsibility, attention-to-detail and customer-service skills within a fast-paced recreational environment
- Earned CPR and First-Aid certification while supporting daily pool operations and emergency-response preparedness, strengthening communication, organization and problem-solving capabilities through hands-on safety and customer-service responsibilities

### Bethesda-Chevy Chase Football

*Team Captain*

**Bethesda, MD**

*May 2024 – Nov 2024*

- Captained Bethesda-Chevy Chase Football to its first 8-win season and quarterfinal appearance in 25+ years, strengthening leadership, accountability and team-development skills while driving competitive success on & off the field during a historic breakthrough season
- Led the team in tackles, receiving yards and receptions while earning All-Conference, All-Division and Defensive Player of the Year honors through high-level athletic performance, discipline and consistent leadership across multiple competitive seasons

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Excel (VLOOKUP, Pivot Tables), PowerPoint, Word | **Interests:** New England Patriots, Tottenham, March Madness, SCUBA, Golf, Weightlifting, Skiing, UFC, Game of Thrones | **Volunteerism:** Provided 250+ hours of service to the elderly/homeless/underserved

# Jonathan Yan

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## EDUCATION

### Emory University

B.B.A. in Finance | Minor in Artificial Intelligence

Atlanta, GA

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0 | **ACT:** 35
- **Relevant Courses:** Macroeconomics, Microeconomics, Excel Wall Street Prep Accounting & Financial Statement Analysis
- **Supplemental Education:** Fall 2025 London Study-Abroad Program in Partnership with IES Abroad & UCL

## PROFESSIONAL EXPERIENCE

### Concordia Capital

Investment Banking Intern

New York, NY

Mar 2026 – Present

- Support 3+ software M&A advisory workstreams through buyer-list construction, marketing materials & IOI/LOI drafting execution

### Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Present

#### Selected Transaction Experience

- Command Zero — *Agentic AI Security Operations Platform (Tech M&A / Strategic Advisory Simulation)*
  - Led the full Execution Phase modeling for a 5-person deal team recommending Command Zero as a target acquisition for MS
  - Assessed ~5 operational risks using CAC, GRR and pipeline metrics to strengthen final investment thesis delivered live on 6/8

### Tatari Systems

Project Finance Intern

Dover, DE

Feb 2026 – Present

- Contribute to ~5 infrastructure project finance analyses involving CapEx/OpEx modeling and tariff/FX rate sensitivities forecasting

### Integrus Partners

Investment Banking Intern

Dallas, TX

Aug 2025 – Nov 2025

- Led diligence analysis for a \$9.3M veterinary clinic sell-side mandate, supporting buyer positioning strategy efforts for sponsors
- Documented 6 client calls, synthesizing business highlights and sell-side positioning considerations for buyer outreach preparation
- Built and screened a 4,000+ company healthcare database, sourcing verified owner contacts for deal origination initiatives nationwide

### Future Voices Academy

Founder & Head Instructor

Charlotte, NC

Jun 2024 – Jul 2025

- Coached speech and debate to 65 students across 240+ hours, generating ~\$8K in program revenue growth annually
- Managed a 3-person leadership team overseeing operations, curriculum strategy and student recruitment initiatives independently
- Tracked a ~\$2K budget and incorporated feedback from 10 interviews to improve curriculum delivery quality significantly

### Duke University Center for Computational Evolutionary Intelligence Lab

Research Assistant

Durham, NC

Jun 2023 – Jul 2023

- Supported a 10-week research initiative at Duke's Computational Evolutionary Intelligence Lab program extensively
- Built 4 neural-network models achieving ~95% pedestrian-detection accuracy for autonomous driving applications research
- Researched deep-learning concepts to improve adaptive object-detection algorithms for real-time vehicle navigation systems

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Goizueta Investment Management Group

Investment Analyst, TMT

Atlanta, GA

Feb 2026 – Present

- Analyzed and pitched 3 technology equities alongside weekly market updates to the investment committee during meetings
- Built financial models tracking revenue, costs and earnings across a \$400K long-only equity portfolio independently weekly

### Recalc Academy

Private Equity Fellow

New York, NY

Dec 2025 – Present

- Collaborated with 4 other fellows to evaluate 6 LBO targets and identify investment theses, risks and priority diligence areas
- Leveraged AI to automate financial modeling within case studies to free capacity for deeper investment analysis and due diligence

### Emory University | Men's Varsity Tennis

NCAA Collegiate Athlete

Atlanta, GA

Aug 2025 – Present

- Collaborated monthly with coaches over Zoom while abroad to review 10+ match films and refine singles/doubles tactics strategically
- Coached 4 beginner players through ~40 lessons, building individualized development plans outside team competition independently

### Global Delta Securities

Investment Analyst, Technology & Innovation

New York, NY

Dec 2025 – Feb 2026

- Initiated coverage of 4 software technology companies & presented long/short investment theses to the investment committee weekly
- Leveraged Claude for Excel to extract financial data + automate translation of modeling logic into structured Excel analyses efficiently

## NON-TECHNICAL SKILLS & INTERESTS

**Languages:** English, Mandarin Chinese | **Skills:** Claude for Excel, Pitchbook, Refinitiv/LSEG, Microsoft Office | **Programs:** Recalc Academy Finance Accelerator, Goldman Sachs Investment University: Private Equity Strategies, Private Credit Investing | **Additional Activities:** Concert Percussionist & Mentor, Church Worship Team, Atrium Health Volunteer, Speech & Debate | **Honors:** North Carolina All-State Percussionist, President's Volunteer Service Award (Gold), IB Diploma Recipient | **Interests:** NBA All-Time Starting Five, Europe Fall Break Trip (Lisbon, Barcelona, Florence, Venice, Milan, Como), Chess Opening Theory

# Jordan I. Vrees

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## EDUCATION

### Swarthmore College

*Bachelor of Arts in Economics | Minor in Mathematics and Computer Science*

**Swarthmore, PA**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 4.0/4.0 | **SAT:** 1470
- **Honors/Awards:** High School Diploma with Designation in Applied Mathematics, First in Merit in Mathematics, and 4.0 GPA
- **Organizations:** NCAA Division III Varsity Women's Soccer, Make-A-Play Foundation, Girls Into Venture Capital, Clarus Capital
- **Relevant Courses:** Intro. to Economics, Politics, Market, and Policy, Multivariable Calculus, Data Structures and Algorithms
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Clarus Capital

*Analyst*

**Swarthmore, PA**

*Feb 2026 – Present*

- Selected as an analyst for Swarthmore's student-run investment fund managing ~\$40K in long-only assets, evaluating macroeconomic trends, industry catalysts and company-specific developments to deliver weekly market updates + strengthen technical skills for finance
- Conducted qualitative industrials research and built football-field valuation analyses to support an investment pitch on NASDAQ: EME, synthesizing market dynamics, valuation methodologies and competitive positioning insights into structured recommendations

### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Apr 2026 – Jun 2026*

#### Selected Transaction Experience

- Alkami Technologies — Digital Banking SaaS Platform (Tech M&A / Strategic Advisory Simulation)
  - Selected as 1/75 NCAA athletes (~20%) to lead Control Phase for a 5-person deal team, validating Alkami's investment thesis by stress-testing market assumptions/competitive positioning/fintech modernization trends to strengthen final recommendation
  - Analyzed 3 structural fintech tailwinds shaping Alkami's growth outlook, including AI infrastructure monetization, vertical SaaS retention rates of 97–98% and digital banking modernization trends across ~10,000 U.S. community banks and credit unions
  - Evaluated competitive risks tied to the "Big Three" banking-core providers — FIS, Fiserv and Jack Henry — assessing Alkami's API-driven differentiation, frontend modularity & MANTL acquisition strategy using 5+ institutional/industry research sources

### Blood Care United (Nonprofit Organization)

*Student Visionary & Co-Leader*

**Rye Brook, NY**

*Jan 2023 – May 2023*

- Participated in a 7-week philanthropic leadership development campaign supporting blood-cancer awareness and patient-care advocacy, coordinating local outreach, fundraising initiatives and community engagement efforts that contributed to \$43K+ raised
- Co-led a 10-person fundraising team that finished 2nd regionally during the Student Visionaries of the Year campaign, strengthening communication, teamwork and organizational leadership skills through event planning, business outreach and donor engagement

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Swarthmore College | Women's Varsity Soccer

*Division III Student-Athlete*

**Swarthmore, PA**

*Sep 2025 – Present*

- Balance 20+ hours/week of Division III soccer training, travel, weightlifting and competition alongside a rigorous academic workload, demonstrating discipline, resilience and time-management skills while contributing 3 goals + 3 assists across 23 total appearances in Y1
- Competed in all 23 conference and postseason matches during freshman season, collaborating with teammates and coaching staff to execute tactical game plans while strengthening communication, accountability and adaptability in a highly competitive environment

### Girls Into Venture Capital

*Fellow*

**Swarthmore, PA**

*Sep 2025 – Present*

- Attend bi-weekly venture capital workshops and industry panels focused on closing the gender gap in finance, developing technical knowledge across founder sourcing, SaaS investing and venture diligence while collaborating with emerging female investors/operators
- Developed a healthcare AI white paper and investment pitch recommending Elysium Labs to Alumni Ventures, analyzing sector trends, medical-device market dynamics and venture-scale opportunities while learning how to develop an investment thesis and present it live

### Make-A-Play Foundation

*Professional Development Fellow*

**Remote**

*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

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Excel (Basic), Google Suite (Sheets, Docs, Slides)

**Languages:** English (Native), Spanish (Basic)

**Interests:** Soccer (Midfielder), Golf (10 handicap), Team Impact, Running (training for the Philly half-marathon)

**Programs:** Java, C, C++

# Julia O. Lewkowitz

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## EDUCATION

### University of Chicago

*Bachelor of Arts in Economics*

Chicago, IL

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.86/4.0
- **Honors/Awards:** Student-Athlete (Women's Volleyball), Mu Alpha Theta Honors Society, Science and Spanish Honors Society
- **Organizations:** Women in Economics, Business Organization for Latino Development; Board member: Smart Woman Securities
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 05/2026)

## PROFESSIONAL EXPERIENCE

### Bank of America

*MAP Investment Banking Fellow; Team Captain*

Remote

*Jan 2026 – May 2026*

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

- 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

*Jun 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/resource planning/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/development phase

### Ransom Everglades Annual Business Challenge

*Competition Finalist*

Miami, FL

*Nov 2023 – Mar 2024*

- Developed a business plan for CulturaSphere VR by evaluating 5+ market segments, analyzing 8–10 competitor offerings, and refining assumptions through multi-round judging, advancing to finals and strengthening structured strategic reasoning under pressure
- Presented CulturaSphere VR's operating and financial model at the 2024 SFERE Conference to 20+ judges and educators, synthesizing insights across 3 core value drivers to improve narrative structure, analytical clarity, and evaluator decision-readiness

### Key Biscayne Island Volleyball

*Paid Assistant Volleyball Coach*

Key Biscayne, FL

*Aug 2021 – Mar 2024*

- Coached 20+ youth athletes by adapting 10–12 weekly drills to varying ability levels and tracking measurable progress across each training cycle, strengthening consistency, discipline, and performance trajectories for players at multiple development stages year-round
- Planned and executed structured practices across 3 full seasons by coordinating group drills, skill stations, and feedback loops for 15–20 players, improving cohesion, technique quality, and readiness throughout recurring competitive cycles each season consistently

## LEADERSHIP & PROFESSIONAL DEVELOPMENT

### University of Chicago Varsity Volleyball Team

*Student-Athlete*

Chicago, IL

*Sep 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 Ambassador

*Student Ambassador*

Miami, FL

*Aug 2022 – May 2025*

- 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, clarity of information, and connection

### Ransom Everglades High School Varsity Volleyball

*Team Captain & Student Athlete*

Miami, FL

*Jul 2021 – Nov 2024*

- Led a varsity roster across 3+ competitive seasons by coordinating practice standards and match preparation while earning All-State, All-Academic, All-Star, and First-Team county honors, strengthening chemistry, competitive focus & sustained on-court performance

## ADDITIONAL SKILLS & INTERESTS

**Trilingual:** English, Portuguese, and Spanish

**Interests:** Listening to podcasts, running, reading, traveling and visiting new places

# Kate I. Ambrose

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## EDUCATION

### Lafayette College

Bachelor of Arts in Economics

Easton, PA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.75/4.0
- **Honors/Awards:** NCAA Division 1 Student-Athlete (Women's Varsity Field Hockey)
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 05/2026))

## PROFESSIONAL EXPERIENCE

### Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – May 2026

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

- HST Pathways — *ASC-Focused Healthcare SaaS Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
  - Led Planning Phase across 4+ parallel workstreams over 2.5 months, coordinating research synthesis, financial modeling, market analysis, and slide production to align deliverables and enforce timeline discipline ahead of client-facing presentation to BofA
  - Synthesized 4 secular healthcare drivers—aging population (22% 65+ by 2030), 7.5% U.S. spend growth to \$4.8T, 78% digital acceleration, and \$1.9T Healthcare IT by 2030—framing cost pressure dynamics to contextualize HST's ASC-focused growth
  - Modeled LTM revenue of ~\$57.1M and 2026E ~\$63.4M with ~75% gross margin and ~65% Adj. EBITDA, benchmarking SaaS healthcare comps to assess scalability, margin durability, and potential valuation positioning under strategic buyer scenarios

### Lang Development Group

Commercial Real Estate Development Intern

Newark, DE

Dec 2025 – Jan 2026

- Analyzed vendor bids across 5+ subcontractor categories for multifamily developments, conducting pricing comparisons and cost variance assessments to support budgeting accuracy and strengthen capital allocation decisions during pre-construction planning
- Partnered with cross-functional construction, finance, and project management teams in 10+ planning sessions, synthesizing cost, timeline & operational inputs into structured tracking tools that improved visibility into development risk + project-level return drivers

### Buffalo Wild Wings

Hospitality Assistant

Newark, DE

Feb 2025 – May 2025

- Managed high-volume takeout operations during peak service windows, coordinating 50+ orders per shift with accuracy checks and prioritization protocols to optimize turnaround time, reduce fulfillment errors & sustain revenue flow under time-sensitive conditions
- Supported front-of-house throughput by overseeing 50+ guest seatings, waitlist flow and cross-team communication, resolving service disruptions in real time to maintain operational efficiency and enhance overall customer experience during peak service hours

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Lafayette College's Women's Varsity Field Hockey

NCAA Division 1 Student-Athlete

Easton, PA

Aug 2025 – Present

- Commit 25+ hours weekly to Division I training, competition, and film review while maintaining full academic load, demonstrating execution discipline, resilience under pressure, and sustained performance consistency in a high-accountability environment
- Contribute to strategic game planning and in-season performance reviews, translating 10+ weekly coaching directives into tactical execution and reinforcing accountability standards across a 25+ athlete roster within a nationally competitive Division I program

### B+ (Be Positive) Foundation (Student Chapter)

President

Newark, DE

Sep 2024 – Jun 2025

- Directed a 12-month fundraising strategy as chapter president, leading 10+ executive meetings and coordinating 30+ volunteers to raise \$48K+ through structured event execution and budget oversight, strengthening support for families impacted by pediatric cancer
- Managed end-to-end event P&L across 5+ initiatives, overseeing budgeting, vendor coordination and post-event ROI analysis to optimize capital deployment and improve engagement yield across 100+ student and community stakeholders throughout the year

### Newark Charter High School & Delaware Sharks Club

Captain, Varsity Field Hockey Team

Newark, DE

Sep 2024 – Jun 2025

- Led 20+ teammates as elected captain, setting performance benchmarks and reinforcing accountability frameworks that strengthened communication efficiency, team cohesion & competitive execution across dual academic-athletic commitments throughout the season
- Supported chapter leadership in planning 4+ cultural and academic initiatives, coordinating logistics, tracking participation metrics, and assisting with budget oversight to improve event execution efficiency and strengthen member engagement across 40+ student-run org.

### National French Honors Society, Newark Charter School

Leader/Secretary

Newark, DE

Sep 2024 – May 2025

- Coordinated bi-monthly executive communications and agenda planning for 40+ members, structuring information flow between students and faculty advisors to improve organizational efficiency and ensure timely execution of chapter initiatives across the semester

## NON-TECHNICAL SKILLS & INTERESTS

**Programs:** Microsoft Word, PowerPoint, Canva

**Skills and Language(s):** English (native), French (basic proficiency), Public Speaking, Presentation Design

**Interests:** Financial Markets, Real Estate Development, Business Development, Competitive Athletics, Leadership in Teams

# Keira CR. Donnelly-Sallows

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## EDUCATION

### Princeton University

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

Princeton, NJ

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.85/4.0 | **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 (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- Cursor — *AI-Native Developer Tools Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1/75 NCAA athletes (~20%) to lead the Planning Phase for an MS-case, analyzing Cursor 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

*Apprentice to the CEO*

Cambridge, UK

*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

*Research Volunteer*

London, UK

*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

*NCAA Division I Student-Athlete*

Stanford, CA

*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

*Women's Sabre Athlete*

International

*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

*School Prefect*

Brighton, UK

*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

*Women In Banking Insight Program Participant*

London, UK

*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.

# Lauren T. Smith

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## EDUCATION

### Cornell University

*Bachelor of Arts in Industrial and Labor Relations*

**Ithaca, NY**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.64/4.0
- **Honors/Awards:** NCAA Division 1 Student-Athlete (Varsity Track & Field); National Honors Society (New Canaan Chapter)
- **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

- 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 to evaluate software/AI-driven acquisition targets for a prospective PE client and deliver a live investment recommendation on 6/8
  - Sized Databricks' opportunity using ~\$758B AI TAM, ~\$75.6B enterprise AI SAM and \$5.4B revenue run-rate, synthesizing 5+ sources to assess AI buildout, platform consolidation and ROI pressure, strengthening market framing & investment conviction
  - Assessed Databricks' risks around AI compute costs, cloud competition and IPO readiness, developing 3+ diligence questions on revenue quality, customer expansion and valuation timing to sharpen thesis defensibility + guide team's later transaction work

### Child Study Center - Yale School of Medicine

*Intern at the Cha Lab*

**New Haven, CT**

*Apr 2025 – May 2025*

- Supported faculty and research teams at Yale by reviewing 25+ grant submissions for accuracy, completeness and compliance, strengthening administrative efficiency & helping advance youth mental health research initiatives through higher-quality submissions
- Coordinated community outreach and created 10+ YouthNAVIGATE interviews, blogs and infographics by engaging organizations, researchers and study participants, translating findings into accessible teen mental health resources that increased research participation

### Gelatissimo Artisan Gelato

*Employee*

**New Canaan, CT**

*Sep 2023 – Nov 2024*

- Delivered high-quality customer service to several guests per day while managing 50+ daily transactions, maintaining an efficient front-of-house environment that improved guest satisfaction, repeat visits and store operations during peak service periods each shift
- Independently handled 10+ store opening, closing and cleaning shifts, overseeing cash procedures, inventory readiness and sanitation standards that strengthened overall accountability, operational consistency and day-to-day business reliability across all assigned shifts

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Cornell Women's Track and Field

*NCAA Division I Student-Athlete; Throws*

**Ithaca, NY**

*Sep 2025 – Present*

- Dedicate 30+ hours weekly to practice, strength training, team meetings and competition across multiple seasons while maintaining open communication with 20+ teammates & coaches, sustaining disciplined performance + strengthening team culture/accountability

### New Canaan High School | Girls Track and Field

*Varsity Outdoor Captain*

**New Canaan, CT**

*Mar 2025 – Jun 2025*

- Voted team captain after earning 4x State Champion honors in javelin, titles in shot put, 2024 All-American recognition and 4 years of High Honors, while mentoring teammates and leading initiatives that strengthened overall team culture and competitive performance

### New Canaan High School | Chapter of the American Red Cross

*Secretary*

**New Canaan, CT**

*Sep 2022 – Jun 2025*

- Collaborated with local organizations and volunteers to coordinate 5+ donation drives and fundraising campaigns for disaster relief, strengthening community engagement and increasing critical resources delivered to families impacted by emergencies locally

### New Canaan High School | Peer Mentorship Program

*Peer Mentor*

**New Canaan, CT**

*Sep 2024 – Jun 2025*

- Selected by teaching staff to lead 10+ school tours for freshmen and international students while advising counselors on inclusion efforts, helping create a more welcoming, informed and supportive campus environment for new students during each academic year

### New Canaan High School | Buddies Club

*Co-President*

**New Canaan, CT**

*Sep 2023 – May 2025*

- Provided leadership in planning 5+ inclusive student-led programs for peers with special needs, launching a school-wide Lunch Club that expanded community connection, peer relationships and meaningful student engagement across the broader campus community

### New Canaan High School | Irish Cultural Club

*Founder & President*

**New Canaan, CT**

*Nov 2023 – Jun 2024*

- Founded and led the Irish Cultural Club at New Canaan, advocating for cultural preservation by drafting 10+ letters to state legislators that supported awareness efforts to prevent the closure of a nearby Irish museum serving the broader local community for students

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Interpersonal, Interactive, Tenacious, Time-Management, proficient in Adobe Rush Premiere

**Interests:** The corporate finance lifecycle, beginning with investment banking's role in advising companies on transactions/capital raising

# Lia R. Nafe

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## EDUCATION

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### Georgetown University

*Bachelor of Arts in Economics*

Washington, DC

*Expected Graduation: May 2029*

- **Cumulative GPA:** 4.0/4.0 | **ACT:** 35
- **Honors/Awards:** Student-Athlete (Sailing), National Merit Commended Student, IL State Scholar, AP Scholar with Distinction
- **Relevant Coursework:** Linear Algebra, Multi-Variable Calculus, Microeconomics, Macroeconomics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 05/2026)

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## PROFESSIONAL EXPERIENCE

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### Rem and Company

*Junior 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

### Bank of America

*MAP Investment Banking Fellow; Team Captain*

Remote

*Jan 2026 – May 2026*

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

- Option Care Health — *Home Infusion Therapy 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 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 (Pharma ~\$600B U.S., Services ~30% of spend, MedTech ~\$800B global) to anchor growth drivers/deal relevance for industry snapshot
  - Built an Option Care Health screening package by defining SOM as ~33M MA members with <1% penetration, benchmarking 4 peers (ChenMed, CenterWell, One Medical + OSH) and drafting 2 key risks with mitigants, sharpening due diligence priorities

### Lock Chicago Escape Rooms

*Game Master*

Evanston, IL

*Jul 2023 – Apr 2024*

- Led 100+ timed escape-room sessions by guiding teams through rapid problem-solving & safety protocols, improving group dynamic/coordination under pressure and strengthening overall guest experience across diverse customer types and dynamic 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

### University of Illinois Chicago Biotechnology Summer Research

*Biotechnology Research Volunteer*

Chicago, IL

*May 2023 – Aug 2023*

- Supported PhD-level research by executing 20+ cell-culture experiments and analyzing outputs through Western blots, PCR and gel electrophoresis, strengthening data quality & contributing to reproducible, well-documented experimental workflows in multiple labs
- Assisted lab transitions and organized 50+ datasets during PhD preliminary review preparation by cataloging samples and protocols across multiple experiments, improving documentation continuity during complex high-stakes review cycles across research teams

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Georgetown University Sailing Team

*NCAA 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 condition; implement race strategies with team under dynamic on-water environments

### Loyola Academy

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

Wilmette, IL

*Aug 2022 – May 2025*

- Coordinated rehearsals and mentor 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

### Community Service Projects

*Volunteer*

Evanston, IL

*Aug 2021 – May 2025*

- Tutored refugee students across 3 community sites, prepare youth meal packs, support dementia-care programming, and restore local trails, collaborating weekly with volunteers to strengthen empathy and service-driven execution across evolving community needs

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## SKILLS & INTERESTS

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- **Skills and Language(s):** French, Excel, Python, Microsoft 365, Financial Modeling, Statistical Analysis
- **Programs:** Wall Street Prep Financial and Valuation Modeling, Excel Essential Training (Microsoft 365)
- **Interests:** Scuba Diving, Sky Diving, Hockey, Golf, Movies, Baking, Hiking, Traveling

# 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:** 3.90/4.0 | **ACT:** 35
- **Honors/Awards:** Division 1 Student-Athlete (Field Hockey), H. Scott Caven III Memorial Scholarship Award, Cum Laude
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 05/2026)

## PROFESSIONAL EXPERIENCE

### Bank of America

*MAP Investment Banking Fellow*

Remote

*Jan 2026 – May 2026*

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

- 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 – Aug 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 & the overall experience for elementary-age students across daily sessions
- 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 across all sessions

## ADDITIONAL SKILLS & INTERESTS

**Skills and Language(s):** Spanish, Adobe Photoshop

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

# Luca D. Corsano Leopizzi

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## EDUCATION

### Johns Hopkins University

*Bachelor of Arts in Economics, International Studies | Minor in Applied Mathematics*

**Baltimore, MD**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 4.0/4.0 | **SAT:** 1520
- **Relevant Courses:** Microeconomics, Macroeconomics, Real Estate Finance, Wall Street Prep Accounting Crash Course
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Aristeia Capital

*Incoming Hedge Fund Summer Analyst*

**Greenwich, CT**

*Jun 2026 – Aug 2026*

- Joining Aristeia Capital, a \$13B AUM hedge fund, as a Summer Analyst after completing a competitive multi-round interview process focused on investment judgment, market awareness and analytical problem-solving across credit and equity investing environments

### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Mar 2026 – Present*

### Selected Transaction Experience

- Databricks — *Enterprise Data & AI Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1 of 75 NCAA athletes (~20%) to lead the full Control Phase for a 5-person deal team, transforming complex Databricks diligence, market research & modeling outputs into a final investment recommendation presented live to MS on 6/8
  - Evaluated 3 enterprise AI catalysts supporting Databricks' long-term positioning, analyzing projected \$2.5T global AI spending, 40% enterprise AI-agent adoption rates & accelerating demand for unified cross-cloud orchestration/governance infrastructure
  - Assessed hyperscaler competition and pricing-compression risks across AWS, Azure and Google Cloud ecosystems, evaluating Databricks' lakehouse architecture, cross-cloud flexibility & 20,000+ enterprise customers to support ~2 mitigants for each risk

### Avity Investment Management

*Summer Intern*

**Greenwich, CT**

*Jun 2022 – Jul 2025*

- Co-authored a published white paper on physical AI for a \$2B AUM investment firm, analyzing long-term economic and market implications while positioning the platform as an early thought leader for UHNW/institutional clients in emerging technology sectors
- Researched 15+ retail-sector companies through financial-statement analysis, sell-side research and valuation work, delivering investment recommendations while gaining exposure to client meetings and portfolio reviews with firm principals & senior investors

### Luke & Luca Football Camp

*Cofounder*

**Greenwich, CT**

*Nov 2022 – May 2025*

- Cofounded and scaled a youth flag-football camp to 25+ participants and ~\$10K in revenue per 2-week session, creating structured mentorship and athletic-development programming that strengthened leadership and entrepreneurship skills through direct experience

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Johns Hopkins Global Macro Lab

*Research Assistant*

**Baltimore, MD**

*Feb 2026 – Present*

- Work directly with economist Domenico Giannone as part of Johns Hopkins' Global Macro Lab, researching 25 years of economic events and central-bank communications to analyze impacts on FX markets, asset prices & macroeconomic indicators during first year
- Analyzed historical monetary-policy announcements and geopolitical developments across 25+ years of market activity, strengthening macroeconomic research and data-analysis capabilities tied to inflation trends, financial markets and global economic performance

### Johns Hopkins Institute for Applied Economics

*Research Assistant*

**Baltimore, MD**

*Jan 2026 – Present*

- Work directly with former White House economist Steve H. Hanke on the Troubled Currencies Project, monitoring black-market FX rates and inflation trends across 10+ unstable economies using purchasing-power-parity analysis and real-time macroeconomic data
- Create daily inflation and currency-depreciation content for Professor Hanke's X account reaching 830K+ followers, analyzing & synthesizing geopolitical/economic developments into concise macroeconomic commentary & data-driven visual reporting initiatives

### Johns Hopkins University Varsity Football

*NCAA Division III Student-Athlete*

**Baltimore, MD**

*Aug 2025 – Present*

- Dedicate 25+ hours/week during football season to practices, film study, weight training and team activities while balancing rigorous academics within Johns Hopkins' nationally competitive Division III athletic environment and high-performance team culture daily
- Contributed to Johns Hopkins Football's NCAA Division III Semifinal appearance during first season with the program, helping achieve a milestone reached only 2 times previously in team history through disciplined preparation and competitive execution

### Operation Snow Shovel

*Founding Member & President*

**Greenwich, CT**

*Sep 2021 – Jun 2025*

- Founded and led a community snow-removal initiative supporting 25+ senior citizens during winter storms, coordinating volunteer operations and earning recognition from local news outlets for meaningful community impact and neighborhood outreach initiatives

## NON-TECHNICAL SKILLS & INTERESTS

**Languages:** English, Italian (Native Speaker)

**Interests/Student Involvement:** JHU Scholars in Finance, Weight Training, Community Service, Travel

# Luke M. Sharp

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## EDUCATION

### University of Pennsylvania

*Bachelor of Arts in Economics Minor in Statistics & Data Science*

**Philadelphia, PA**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 4.0/4.0
- **Honors/Awards:** Varsity Sprint Football
- **Relevant Courses:** Introductory Business Statistics | Introductory Microeconomics | Python for Data Science
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Generational Group

*Incoming Valuation Intern*

**Dallas, TX**

*May 2026 – Aug 2026*

- Expected to support 5+ live sell-side M&A engagements for founder-owned middle-market businesses in Dallas, TX by building DCF models, trading comparables and sensitivity analyses to evaluate enterprise value ranges and support transaction positioning efforts
- Expected to assist in drafting 3+ Confidential Information Memoranda (CIMs) & analyzing valuation gaps between client expectations and buyer pricing frameworks, translating financial performance and growth drivers into actionable deal insights for senior bankers

### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Mar 2026 – Present*

#### Selected Transaction Experience

- Databricks — *Enterprise Data & AI 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 Databricks by structuring 5+ financial assumptions tied to enterprise AI adoption, cloud infrastructure demand, and long-term software trends
  - Built 4+ banker-style exhibits evaluating AI-native positioning, recurring enterprise revenue and multi-cloud expansion strategy, establishing frameworks around margin trajectory, pricing power and long-term value creation across data infrastructure markets
  - Defined 5+ diligence priorities for a 5-person deal team, including hyperscaler competition, semiconductor supply constraints and monetization of AI workloads, enabling downstream workstreams to stress-test assumptions & refine the investment thesis

### AfterQuery (YC-Backed AI Research Startup)

*Business Intern | Project Red*

**Remote**

*Feb 2026 – Present*

- Reviewed 25+ AI-generated financial deliverables for analytical rigor, structural accuracy and formatting consistency, identifying errors in reasoning and prompting to improve output quality across financial research workflows used in training and evaluation processes
- Executed structured QA processes using manual review and cross-model validation, providing detailed written feedback that strengthened dataset integrity, improved reliability and supported scalable AI-driven financial analysis initiatives across the platform

### Palagic Value Management LP

*Investment Intern*

**Dallas, TX**

*Jun 2025 – Aug 2025*

- Analyzed 10+ SEC filings, earnings transcripts and investor presentations to develop investment briefs supporting portfolio allocation decisions across a ~\$300M AUM small-cap long/short fund focused on fundamental equity research + small-cap market opportunities
- Engaged with 5+ sell-side equity analysts to challenge assumptions, refine variant views and validate industry outlooks, strengthening financial analysis, investment judgment & understanding of public market positioning across sectors + evolving economic conditions

### PGA Frisco Fields Ranch

*Caddie*

**Frisco, TX**

*Jun 2025 – Aug 2025*

- Delivered high-touch client service to executives and professional athletes across 55+ rounds at PGA headquarters, maintaining professionalism, precision and strong interpersonal communication in a fast-paced hospitality environment during high-profile events

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Big Brother Big Sister

*Mentor*

**Philadelphia, PA**

*Jan 2026 – Present*

- Provide weekly one-on-one mentorship to 1 local student through academic, recreational and community-based activities, building trust, confidence and communication skills while supporting personal and social development over time through consistent guidance
- Coordinate 3+ monthly activities both inside and outside school settings, fostering consistency, positive engagement and relationship-building with mentee through dependable mentorship & individualized support tailored to the student's interests + goals

### Wharton Business & Investment Organizations

*Investment & Commodities Analyst (Wharton Investment & Trading Group – TMT & Wharton Undergraduate Hedge Fund Club)*

**Philadelphia, PA**

*Aug 2025 – Present*

- Selected as 1/4 freshmen from 100+ applicants for a competitive TMT investment team, building valuation models, developing sector coverage and presenting stock pitches while publishing weekly market updates on semiconductor and AI infrastructure companies
- Analyze commodity supply-demand dynamics and macroeconomic catalysts impacting pricing, collaborating with long/short analysts to evaluate investment opportunities and support future portfolio positioning across public markets and commodities sectors

## NON-TECHNICAL SKILLS & INTERESTS

**Interests:** Football | Basketball | Baseball | Golf | Running | Music | Half Marathons | Saxophone | Skiing | Water-sports | Swimming

**Organizations:** 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

# Mark A. DiMaggio III

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## EDUCATION

### Yale University

*Bachelor of Arts in Economics*

New Haven, CT

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.78/4.0
- **Honors/Awards:** AP Scholar with Distinction), Rye Neck High School High Honor Roll, USRowing Youth Summer National Champion, National/Tri-M Music Honor Society, Science National Honor Society, President's Award for Educational Excellence
- **Relevant Courses:** Introductory Microeconomics, Introductory Macroeconomics, Calculus II, AP Macroeconomics (5), AP Statistics (5), AP Computer Science A (5), AP Calculus BC (5), Wall Street Prep Accounting & Financial Statement Analysis

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- Marvell Technology — *AI Infrastructure Semiconductor Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1/75 NCAA athletes (~20%) to direct the Execution Phase for a 5-person deal team, building valuation models, precedent transaction analysis and AI infrastructure risk frameworks to recommend Marvell as a strategic acquisition live to MS
  - Analyzed 2 semiconductor precedent transactions totaling \$11B+ in enterprise value, benchmarking 7.8x–21.7x EV/Revenue and 47.1x–59.4x EV/EBITDA multiples to strengthen Marvell's AI connectivity and chip-infrastructure investment positioning
  - Synthesized financial and operational analysis using 5+ institutional and capital markets sources, evaluating AI demand concentration, foundry dependence and U.S.–China export restrictions to support a more defensible final investment thesis

### 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 investor-focused diligence analysis
- Collaborate on specialized analyst teams evaluating early-stage startups across multiple sectors, synthesizing market research and company findings into investor-ready deliverables that strengthen diligence workflows and venture investment decision-making

### MakeInspires Makerspace

*Intern*

Mammaroneck, NY

*May 2025 – Jun 2025*

- Operated and maintained 3D printers and CNC machines across multiple fabrication projects, diagnosing tooling and production issues that minimized downtime and improved operational efficiency within a fast-paced collaborative makerspace environment/space
- Supported prototyping and workshop initiatives by troubleshooting fabrication constraints and explaining technical processes to students and visitors, strengthening collaboration, equipment readiness and safe execution across 10+ active multidisciplinary projects

### Rye Golf Club

*Lifeguard*

Rye, NY

*Jun 2023 – Sep 2024*

- Monitored pool and deck operations during high-traffic summer periods, enforcing safety procedures and maintaining constant vigilance that increased safety for all members + reduced preventable incidents across a busy private club environment on a daily basis
- Earned CPR/AED and First Aid certifications while coordinating with supervisors and staff across 2 peak summer seasons/periods, supporting rapid emergency response readiness and reinforcing a safe environment for private members & visiting families year-round

## 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 while strengthening leadership, communication and teamwork in strict conditions

### Rye Neck High School

*Independent Researcher, Saxophonist, Teacher's Assistant*

Rye, NY

*Sep 2021 – Jun 2025*

- Conducted independent research on drone deployment in crisis-response environments, evaluating scalability, cost efficiency and operational constraints to develop technology-driven emergency-response recommendations integrating economics/engineering rules
- Performed in school music ensembles for 10+ years while serving as a 2-year Tri-M Music Honor Society member, earning 3 departmental awards + strengthening peer leadership within the school's music and arts community through mentorship/collaboration

### RowAmerica Rye

*Varsity Rower*

Rye, NY

*Jul 2020 – Jun 2025*

- Dedicated 25+ hours/week year-round to rowing training, travel and competition, strengthening team accountability and daily practice intensity while balancing rigorous academics across 5 years of elite youth athletics participation at nationally competitive regattas

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Personal Investment Portfolio Management, Java (limited), Spanish (limited), Research/Data Analysis, Independent Research Design  
**Interests:** Artificial Intelligence, Cryptocurrency, Skiing, 3D-Printing, Poker, Rowing, Hiking

# Maya L. de Brouwer

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## EDUCATION

### Stanford University

*Bachelor of Arts in Economics | Minor in Political Science*

Stanford, CA

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.9/4.0
- **Honors/Awards:** NCAA Division 1 Student-Athlete (XC/T&F - Distance), NCAA West Region XC Team Champion (2025)
- **Relevant Courses:** Economic Analysis I, Principles of Economics, Exploring AI, Wall Street Prep Accounting Crash Course

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- 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 final pitch book evaluating Marvell's long-term AI infrastructure for MS
  - Evaluated 4 investment drivers supporting Marvell's positioning within the AI infrastructure cycle, analyzing custom ASIC leadership, electro-optics exposure and projected hyperscaler AI CapEx exceeding \$670B by 2026 to support long-term growth
  - 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

### Spartan Allstars

*Camp Counselor & Coach*

Los Angeles, CA

*Jun 2025 – Aug 2025*

- Led daily athletic training sessions for groups of 4-12 year-old athletes, designing 5+ structured drills across multiple sports and maintaining a structured environment that improved skill development, participation & overall camper engagement for a full summer
- Coordinated 10+ group activities, schedules and staff communication across daily sessions, ensuring smooth program execution and positive participant experiences while balancing safety, instruction quality and effective time management under tight timelines

### Handel's Ice Cream

*Customer Service Associate*

La Cañada, CA

*Jun 2022 – Jul 2025*

- Delivered high-quality customer service in a fast-paced retail environment, managing 50+ orders during peak shifts while maintaining accuracy, efficiency and strong customer satisfaction across daily store operations & busy weekend rushes consistently during summer
- Operated cashier systems and processed 50+ transactions per shift, developing attention to detail and accountability while balancing multiple responsibilities for ~8 hours/day in a time-sensitive customer-facing environment during high-volume service periods/week

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Stanford University Cross Country & Track

*NCAA Division 1 Student-Athlete*

Stanford, CA

*Aug 2025 – Present*

- 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*

La Cañada, CA

*Aug 2022 – Jun 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 critical surgical care for children globally across underserved communities in need
- 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 across communities

### La Cañada High School Cross Country & Track

*Team Captain*

La Cañada, CA

*Aug 2024 – Jun 2025*

- Led team practices and mentored 15+ younger athletes across weekly sessions, fostering a supportive environment while maintaining high performance standards during training cycles, competitive meets 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, collaboration and overall performance outcomes across the program during a highly competitive indoor/outdoor season 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 and skill-building sessions 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, community visibility and sustained participation among new riders

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Excel (basic), Market Analysis, Financial Concepts (valuation, SaaS metrics), Team Leadership

**Languages:** English (Native), Spanish (Intermediate)

**Interests:** Distance running, mountain biking (national competitor), sustainability, global travel (U.S./Peru/Belgium citizenship), outdoors

# Michelle L. Kaneti

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## EDUCATION

### Brown University

*Bachelor of Arts in Business Economics*

Providence, NJ

*Expected Graduation: May 2029*

- **Cumulative GPA:** 4.0/4.0 | **ACT:** 34
- **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; Intermediate Microeconomics; Principles of Economics; Cybersecurity and International Relations

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow; Team Captain*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- 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 using ~\$391B–\$3.5T AI TAM, ~\$133.7B software SAM and ~\$4–6.7B SOM, 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

### 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

### Houlihan Lawrence

*Real Estate Intern*

Larchmont, NY

*May 2025 – Jun 2025*

- Conducted comparative analysis on 5+ properties by evaluating home features, neighborhood trends and recent sales data, helping brokers refine pricing strategies, strengthen client recommendations and position listings more competitively in local real estate market
- Liaised with clients during multiple property showings by answering buyer questions, presenting key home details and maintaining professional communication throughout the sales process, improving client experience + trust from first visit through follow-up stages

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Brown University Sailing Team

*NCAA Division 1 Student-Athlete; Freshman Captain*

Providence, RI

*Aug 2025 – Present*

- Coordinate current freshman members of the Brown Sailing Team, supporting onboarding, communication and team integration with upperclassmen for 10+ athletes while strengthening class cohesion, accountability & a smooth transition into D1 college athletics

### ACE Tutoring Club

*President*

Larchmont, NY

*Jul 2021 – Jun 2025*

- Led and coordinated a team of 30-50 high school volunteers providing tutoring support to 50+ local middle school students, expanding academic assistance capacity and improving learning access for students across the surrounding community each year
- Managed club logistics by collaborating with staff across multiple institutions and implementing in-person and virtual tutoring formats, streamlining scheduling, increasing accessibility and strengthening program consistency for students, families and volunteer tutors alike

### 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, Derivative Investment Group & Socially Responsible Investment Fund)*

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 Women In Business; Brown Derivative Investment Group; Brown Socially Responsible Investment Fund

**Interests:** Sailing, Skiing, Formula 1, Jazz

# Nishali Musunuri

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## EDUCATION

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### Carnegie Mellon University

*Bachelor of Arts in Business Administration*

**Pittsburgh, PA**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.8/4.0 | **SAT:** 1580
- **Honors/Awards:** NCAA Student-Athlete (Women's Basketball), Dean's List (2025), Jalen Brunson Patriot Pride Leadership Scholarship Recipient, AP Scholar w/Distinction, Stevenson High School Gold Honor Roll (4x), Seal of Bilingual Recipient
- **Relevant Courses:** Accounting, Macroeconomics, Microeconomics, Business Computing, Calculus
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

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## PROFESSIONAL EXPERIENCE

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### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Mar 2026 – Present*

#### Selected Transaction Experience

- Heidi Health — *AI Clinical Documentation & Workflow Automation 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 healthcare AI research, revenue trends and enterprise adoption data into a final recommendation evaluating Heidi's long-term automation opportunity
  - Evaluated 4 investment drivers supporting Heidi's AI-workflow platform, analyzing enterprise healthcare adoption across 116 countries, 128% YoY revenue growth and expanding AI-enabled infrastructure improving scalability and workflow automation
  - Monitored Heidi's financial profile and strategic fit within healthcare automation, analyzing improving margins from -50% to -10%, enterprise validation and cross-sell opportunities supporting a final 'go' recommendation for long-term AI-driven growth

### Caresource

*Summer Analyst*

**Berkeley, CA**

*Jun 2024 – Aug 2024*

- Conducted healthcare-insurance market analysis supporting an M&A transaction, evaluating peer benchmarks, industry trends and financial performance while strengthening corporate-development, research and valuation skills within a live deal environment
- Built a DCF model and sensitivity analyses for a healthcare acquisition target, estimating a \$69M valuation within 2% of the final purchase price while strengthening financial-modeling and investment-analysis capabilities through transaction support work

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Women in Business

*Active Member*

**Pittsburgh, PA**

*Dec 2025 – Present*

- Participate in 10+ professional-development workshops focused on finance, market trends and career readiness, strengthening business acumen, communication and analytical skills relevant to future finance opportunities and competitive recruiting preparation
- Engage with 15+ industry professionals and alumni through networking events and speaker discussions, strengthening relationship-building, market-awareness and career-development skills through exposure to finance-industry perspectives & recruiting

### Carnegie Mellon Varsity Basketball

*NCAA Varsity Student-Athlete*

**Pittsburgh, PA**

*Aug 2025 – Present*

- Commit 30+ hours/week to Division III basketball training, competition and travel while balancing a rigorous academic workload, strengthening discipline, resilience & time-management skills within a nationally competitive collegiate environment throughout season
- Represented the program through recruitment efforts, campus visits and student-athlete mentorship, strengthening leadership, communication and relationship-management skills while supporting team culture and prospective-athlete engagement initiatives

### Freshman Mentor Program

*Site Visit Director & Mentor*

**Chicago, IL**

*Aug 2023 – May 2025*

- Mentored 25 freshmen on academic planning, campus resources and student transition support, strengthening leadership, communication and mentorship skills while fostering community engagement through structured programming initiatives
- Collaborated with 4 mentors to develop presentations and engagement activities while presenting program strategies to faculty stakeholders, strengthening public-speaking, teamwork and advocacy skills supporting long-term program growth initiatives

### Catalyst - Substance Use Prevention Coalition

*Leader & Advocate*

**Chicago, IL**

*Aug 2021 – May 2025*

- Advocated alongside legislators for 3 youth-focused policy initiatives at the Illinois State Capitol, strengthening public-speaking, leadership and policy-advocacy skills while supporting substance-use prevention and youth-health initiatives across local communities
- Led education campaigns and facilitated 10+ school discussions promoting healthy decision-making and substance-use awareness, strengthening communication, leadership and community-engagement skills through student-focused outreach initiatives

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## SKILLS & INTERESTS

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- **Skills and Language(s):** Microsoft Office Suite, Spanish Proficiency (Intermediate)
- **Programs:** Financial Analyst Training Program (FAST), CMU Student-Athlete Mentoring Program
- **Interests:** Playing Drums and Piano, Cooking and Trying New Foods, Playing Tennis, Sneaker Reselling, Traveling

# Olivia Migyu Kim

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## EDUCATION

### Harvard University

*A.B. in Economics | Double Concentration in Psychology*

Cambridge, MA

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.92/4.0 | **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 (*to be completed by 6/26*)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow; Team Captain*

Remote

*Mar 2026 – Present*

#### 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 to evaluate software/AI-driven acquisition targets for a prospective PE client and deliver a live investment recommendation on 6/8
  - Sized Command Zero's opportunity using ~\$6.31T IT TAM, ~\$1.15T AI/software SAM and ~\$45B SOM, synthesizing 4+ sources to evaluate demand across agentic AI/cybersecurity/vertical SaaS, grounding the investment thesis in scalable adoption
  - Assessed Command Zero's positioning against 4+ competitors including Palo Alto, Prophet Security and Dropzone AI, analyzing differentiation in autonomous investigation/multi-cloud compatibility/reasoning traceability to lead downstream work

### Junova, Inc.

*Marketing & Operations Intern*

Remote

*Sep 2025 – Present*

- Lead marketing initiatives for a travel AI startup by managing an affiliate network that drove acquisition of 400+ users, expanding customer reach, improving channel performance and strengthening hands-on experience in early-stage growth execution and strategy
- Leveraged online databases and published surveys to size a 600M-passenger market while contributing insights in weekly strategy meetings, helping inform product and brand decisions that supported 600+ customer savings cases and \$9.5K in net revenue growth

### 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 5+ 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*

Amherst, 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)

*Analyst*

Austin, TX

*Sep 2025 – Present*

- Identify 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
- Serve on the Annual VCG Entrepreneurship Summit Committee, driving attendee engagement through ticket outreach, sponsorship coordination and panel logistics that improved event execution, participation & professional visibility at a flagship campus conference

### Kevin Love Fund Youth Advisory Council

*Council Member*

Remote

*Jan 2023 – Aug 2025*

- Chosen from a nationwide applicant pool to design engaging educational materials that reduced mental health stigma among students, expanding awareness, peer engagement and access to supportive resources through youth-centered advocacy initiatives

## 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 R. Makhanya

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## EDUCATION

### University of Massachusetts | Isenberg School Of Management

Amherst, MA

Bachelor of Arts in Business Administration in Finance | Minor in Economics

Expected Graduation: May 2029

- **Cumulative GPA:** 3.7/4.0
- **Honors/Awards:** Graduated High School a Semester Early ( IMG Academy ), Recipient of UMass Chancellor's Award Scholarship, NCAA D1 Tennis, UMass Leadership Academy Nominee, Leadership on UMass Black Student Athlete United, Noviam and SIFMA, Virtual Stock Market Game Competition - Top 5 finisher, MAP Formula 1 Fellowship Selective
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### South Shore Investment Services

Norwell, MA

Incoming Private Wealth Management Intern

Jun 2026 – Aug 2026

- Joining South Shore Investment Services as an Incoming Private Wealth Management Intern, expected to work directly with 2 incoming advisors and the CEO on client-focused financial planning, investment analysis and long-term wealth management initiatives
- Expected to support portfolio analysis, retirement-planning discussions and client relationship management across a collaborative advisory environment, strengthening exposure to fiduciary wealth management and personalized financial-planning strategies

### Morgan Stanley

Remote

MAP Investment Banking Fellow; Team Captain

Mar 2026 – Present

#### Selected Transaction Experience

- Heidi Health — AI Clinical Documentation & Workflow Automation Platform (Tech M&A / Strategic Advisory Simulation)
  - Selected as 1/75 NCAA athletes (~20%) to oversee the Execution Phase for a 5-person deal team, developing valuation analysis, acquisition rationale & operational risk frameworks across ~5 weekly deliverables to recommend Heidi Health as an acquisition
  - Researched 2 consumer and technology-focused acquisitions totaling \$5.6B+ in enterprise value, evaluating strategic expansion, accessibility positioning and international growth rationale to strengthen our team's final recommendation, delivered live to MS
  - Built financial and operational analysis using 5+ industry and institutional sources, evaluating AI documentation risk, data privacy concerns and system-security vulnerabilities to strengthen the team's investment thesis and long-term market positioning

### Smart Women Securities

Amherst, MA

Part-Time Employee

Oct 2025 – Nov 2025

- Spent several weeks researching Abercrombie & Fitch's turnaround strategy through SEC filings, earnings transcripts and peer benchmarking, building a high-conviction investment thesis that strengthened equity research and valuation-analysis capabilities
- Developed and presented a buy-side stock pitch on Abercrombie & Fitch using peer valuation analysis against 2 retail competitors, evaluating margin expansion, brand repositioning and P/E multiples to support a final data-driven investment recommendation

## LEADERSHIP & COMMUNITY DEVELOPMENT

### UMass Investment Banking Group

Amherst, MA

Junior Analyst

Dec 2025 – Present

- Expected to complete 10+ hours/week of technical training covering DCFs, precedent transactions, comparable companies and LBO fundamentals, strengthening valuation and financial-modeling skills in preparation for competitive investment banking recruiting
- Expected to collaborate with 4–6 analysts on mock M&A transactions, building valuation materials, market overviews and pitch-style presentations that simulate live investment banking workflows and strengthen deal-focused analytical thinking

### University of Massachusetts Women's Varsity Tennis

Amherst, MA

NCAA Division I Student-Athlete

Jan 2025 – Present

- Balance 20–40+ hours/week of Division I tennis training, travel and competition alongside an 18-credit academic workload, demonstrating discipline, resilience and strong time-management skills within a demanding student-athlete environment at UMass
- Collaborate with 10+ teammates and 2 coaches across a 20+ match competitive season, strengthening teamwork, communication and leadership while contributing to match preparation & overall team performance execution in high-pressure competitive environments

### Black Student Athlete United

Amherst, MA

Executive Board Member ( Tennis Representative)

Jan 2025 – Present

- Selected as 1 of 6 representatives advocating for 100+ student-athletes across 21+ UMass athletic teams, serving as a liaison to athletic administration and supporting inclusivity initiatives, policy discussions and broader student-athlete engagement across campus athletics
- Managed BSAU's digital presence across multiple social platforms, implementing data-informed content strategies that increased member-engagement by 30%, expanded reach to 500+ followers and contributed to a 50% increase in student event participation

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Microsoft Office Suite (Excel, Powerpoint, Word) isiZulu and seTswana receptive bilingualism

**Certifications:** Bloomberg Market Concepts, Bank of America Forage IB Simulation, Data Camp AI in Business ( Intro. to Chat GPT )

**Interests:** Pickleball, Padel, Plant- based Cooking, New York Times wordle and connections, Smoothie- Making

# Rayna Li

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## EDUCATION

### Massachusetts Institute of Technology

Bachelor of Science in Computer Science, Data Science, & Economics | Minor in Finance

Cambridge, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 5.0/5.0 | **SAT:** 1550
- **Relevant Courses:** Fall 2025 – Principles of Microeconomics, Introduction to Programming with Python, Spring 2026 – Introduction to Computational Thinking & Data Science, Math for Computer Science, Wall Street Prep Accounting Certification

## PROFESSIONAL EXPERIENCE

**Intel** **Santa Clara, CA**  
*Incoming Sales Operations Undergraduate Intern* *Jun 2026 – Aug 2026*

- Joining Intel's Sales Operations team this summer to support its data-driven sales strategy and cross-functional planning initiatives

**Bank of America** **Remote**  
*MAP Investment Banking Fellow* *Jan 2026 – May 2026*

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

- Delcath Systems — *Oncology Drug-Delivery Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
  - Constructed team's financial model for Delcath Systems, building revenue projections assuming 35% CAGR through 2028 and transition to positive EBITDA by 2026 while analyzing 87% gross margins to build an investment thesis for a fictional PE client
  - Built valuation framework benchmarking Delcath against oncology peers including TriSalus and Novocure while referencing strategic healthcare transactions such as Stryker–Inari (\$5B) and Boston Scientific–Penumbra (\$14.5B) to contextualize growth
  - Performed sensitivity analysis around 3 key risks including reimbursement coverage, physician training bottlenecks, and potential capital dilution while incorporating \$91M cash runway assumptions to evaluate downside scenarios/strengthen recommendation

**MIT Department of Political Science** **Cambridge, MA**  
*Undergraduate Research Assistant* *Jan 2026 – Feb 2026*

- Compiled and standardized parcel-level GIS datasets across 100+ Boston-area municipalities, applying spatial analysis techniques to examine zoning and economic development patterns, strengthening the reliability of geospatial data used for housing policy research
- Developed Python-based predictive algorithms analyzing 1,000+ parcel-level observations to model redevelopment likelihood and housing transformation drivers, producing spatial visualizations that informed research on zoning policy and urban housing dynamics

**Collins Permian** **Dallas, TX**  
*Summer Intern* *May 2025 – Aug 2025*

- Designed an OCR + LLM-powered workflow extracting historical return data from investment decks, automating data ingestion and accelerating processing speed by 80%, improving efficiency of internal analytics workflows used for investment evaluation
- Evaluated 13 AI automation platforms for potential deployment, analyzing cost, integration feasibility, and operational impact before presenting implementation recommendations to the executive team and securing buy-in for future AI-driven workflow integration

**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 conduct research on Dallas water systems, performing spatial and statistical analysis using ArcGIS and R before presenting findings/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; previously ranked Top 20 U.S. high school tennis player by UTR and recipient of the 2025 USTA Outstanding Sportsmanship Award

**MIT Society of Women Engineers (SWE)** **Cambridge, MA**  
*Campus Representative* *Sep 2025 – Present*

- Coordinate logistics and front-end execution for monthly SWE events serving 500+ members, collaborating with committee leadership to reserve spaces, manage online coordination & promote programming that strengthens academic/community engagement

**MIT Asian American Association** **Cambridge, MA**  
*Internal Social Chair* *Sep 2025 – Present*

- Plan and execute 3–5 internal events per semester, coordinating logistics, scheduling, and communications across executive leadership to strengthen team cohesion & collaboration through structured social programming /consistent member engagement across the org.

**ACEing Autism** **McKinney, TX**  
*Court Lead & Social Media Director* *Jan 2019 – Aug 2025*

- Led weekly tennis clinics for athletes with autism while managing outreach through 8 social media platforms, distributing reminders and marketing materials that expanded participation and strengthened community engagement across multiple program locations

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Python, Java, JavaScript, Photoshop | **Interests:** Finance, AI, Computer Science, Financial Technologies, Pickleball

**Languages:** English: fluent – Mandarin: fluent | **Programs:** Sigma Kappa Sorority | **Certifications:** Wall Street Prep Accounting Course

# Renee C. Bak

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## EDUCATION

### Johns Hopkins University

*Bachelor of Arts in Economics | Minor in Applied Math and Statistics*

**Baltimore, MD**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.43/4.0 | **SAT:** 1530 (Math – 800, Reading – 730)
- **Honors/Awards:** Bishop Eustace Preparatory School Valedictorian & Scholar Athlete Awardee, AP Scholar with Distinction
- **Relevant Courses:** Elements of Macro & Microeconomics, Identifying and Capturing Markets, Public Health Biostatistics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Mar 2026 – Present*

#### Selected Transaction Experience

- Databricks — *Enterprise Data & AI Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1/75 NCAA athletes (~20%) to direct the Planning Phase for a Morgan Stanley-case, assessing Databricks through 5+ financial inputs tied to enterprise AI deployment, cloud adoption trends, and long-term scalability across data infrastructure
  - Developed 4+ strategic exhibits analyzing Databricks' growth trajectory, margin profile and capital structure, framing how recurring enterprise demand & AI infrastructure expansion influence profitability, valuation and durable competitive positioning
  - Established 5+ key diligence workstreams for a 5-person deal team, focusing on revenue concentration, IPO readiness, leverage exposure and margin sustainability, helping downstream phases weigh risk factors & pressure-test core investment assumptions

### Typa (YC S24)

*Consultant, Go-to-Market & Customer Acquisition*

**Baltimore, MD**

*Feb 2026 – Present*

- Recruited to a 4-person consulting team supporting a Y Combinator-backed AI SaaS startup, developing go-to-market and targeted customer acquisition strategies to strengthen outbound growth & improve lead generation across mid-market B2B software customers
- Built an outbound pipeline targeting 50+ Heads of Content at B2B SaaS companies, researching and qualifying prospects through a custom scoring rubric to prioritize high-fit leads and support scalable customer acquisition initiatives across outbound sales campaigns

### Jersey Wahoos

*Assistant Coach*

**Mount Laurel, NJ**

*Sep 2024 – May 2025*

- Coached 20+ youth swimmers by designing structured training plans focused on technique, safety and performance improvement, helping athletes achieve measurable progression & stronger competitive outcomes throughout the season + competitive meet settings
- Recorded race splits and timing data across 15+ swimmers to evaluate individual progression and inform targeted training adjustments, strengthening analytical thinking and athlete development within a competitive swim environment focused on long-term improvement

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Johns Hopkins Swimming

*NCAA Division III Varsity Athlete*

**Baltimore, MD**

*Aug 2025 – Present*

- Recruited as the top-ranked woman in the class, earning NCAA Division III All-American honors and Championship qualification as a freshman while balancing 20+ hours weekly of training, travel, recovery and competition alongside rigorous academic commitments
- Collaborate with 30+ teammates and coaching staff in a nationally competitive program, strengthening communication, accountability and performance execution across practices/dual meets/championship-level competition throughout the collegiate season/off-season

### Jersey Wahoos Swim Club

*National Squad Member*

**Mount Laurel, NJ**

*Aug 2021 – Jul 2025*

- Qualified for USA Swimming Futures in 3 events including the 50 Free, 100 Free and 100 Breast, demonstrating sustained elite performance across national-level competition and multi-year athletic development cycles against top regional talent from 2021-2025
- Committed 25+ hours weekly to a nationally competitive USA Swimming Silver Medal Club program, balancing rigorous training demands with academics while strengthening discipline, resilience and long-term performance consistency over 4 years of competition

### Bishop Eustace Preparatory School

*Vice President of National Honor Society*

**Pennsauken, NJ**

*Oct 2023 – May 2025*

- Directed a school-wide blood drive in partnership with the American Red Cross, coordinating donor outreach, logistics and event operations to support hospital supply needs and strengthen community engagement initiatives & efforts across the entire student body
- Delivered the National Honor Society induction ceremony address to 100+ attendees, emphasizing service leadership, academic excellence and community involvement while strengthening public speaking & leadership communication skills in school-wide settings

### Bishop Eustace Preparatory School

*Pallottine Ministry Leader and Volunteer*

**Pennsauken, NJ**

*Sep 2021 – May 2025*

- Selected as 1 of 8 student leaders to facilitate retreats and coordinate service initiatives, organizing food and toy drives that supported underserved communities and strengthened school-wide volunteer engagement efforts throughout the academic school year & beyond
- Taught water safety and swimming fundamentals to underprivileged children across Kensington and West Philadelphia, helping build confidence, safety awareness and foundational swimming skills through hands-on instruction and mentorship within the community

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Excel, Financial Modeling, Data Analysis, Microsoft Office Suite | **Interests:** Cooking shows, dogs, outdoor activities, trying new restaurants and cafes | **Organizations:** Alpha Kappa Psi Business Fraternity, Women in Business, Alpha Phi Sorority

# Sasha D. Bauhs

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## EDUCATION

### University of Pennsylvania | Wharton School of Business

*Bachelor of Science in Economics | Concentration in Finance and Management*

Philadelphia, PA

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.82/4.0 | **ACT:** 35
- **Relevant Courses:** Business Statistics, Managerial Economics, Calculus, Operations
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)
- **Organizations:** Women's Varsity Squash, International Business and Economics Club (European Committee), Wharton Women, Penn, Athletics Wharton Leadership Academy, Wharton Investment and Trading Group

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- Databricks — *Enterprise Data & AI Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1 of 75 NCAA athletes (~20%) to lead the Execution Phase for a deal team of 5, constructing valuation frameworks, transaction benchmarking & investment risk analysis across 15+ deliverables to recommend Databricks as a strategic acquisition
  - Developed financial and operational risk analysis using 5+ institutional and industry sources, assessing AI regulation, scaling complexity & competitive pressure across Databricks/Snowflake/Microsoft to improve investment thesis + downside awareness
  - Evaluated 2 AI-driven precedent transactions totaling \$1.25T+ in implied enterprise value, analyzing 66x–175x EV/Revenue multiples, platform convergence trends, and future monetization assumptions to strengthen Databricks' acquisition rationale

### Freelance Private Coaching

*Founder, Coach*

Summit, NJ

*Apr 2024 – Aug 2025*

- Founded and managed a private squash coaching business delivering 18+ weekly lessons for athletes ages 5–16, designing customized training plans and technical instruction that supported clients competing in major junior tournaments, including the U.S. Junior Open
- Coordinated match-film analysis, personalized development plans and tactical coaching across 15+ recurring student relationships, strengthening client performance, retention and competitive readiness while expanding operational scale/long-term coaching demand

### The Pingry School | Corporate Finance Institute

*Independent Senior Project*

Basking Ridge, NJ

*May 2025 – Jun 2025*

- Completed Corporate Finance Institute FMVA coursework covering valuation methodologies, Excel-based financial modeling and scenario analysis, applying technical finance concepts through a 5+ week independent project that strengthened presentation skills
- Built financial models and sensitivity analyses in collaboration with Pingry's CFO for a private secondary school, evaluating operational and budgeting assumptions across multiple scenarios to support more data-driven financial planning and strategic decision-making

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Penn Women's Varsity Squash

*NCAA D1 Student-Athlete*

Philadelphia, PA

*Sep 2025 – Present*

- Dedicate 15+ hours/week to Division I training, travel and competition while contributing to Penn's first women's national squash championship since 2000, strengthening discipline, resilience and performance consistency within a competitive athletic environment
- Achieved a top-10 U.S. national squash ranking from ages 9–19 while earning 2x U.S. Squash All-American and 4x Scholar Athlete honors, demonstrating long-term competitive excellence and sustained academic performance across national tournament play

### Penn International Business and Economics Club

*European Committee Member*

Philadelphia, PA

*Sep 2025 – Present*

- Participate in weekly finance and accounting workshops focused on valuation, market analysis and investment research, strengthening technical knowledge, financial modeling capabilities & overall business acumen within a competitive student-led business organization
- Conduct equity research across semiconductor, energy and defense sectors using DCF valuation and industry analysis frameworks, developing long investment recommendations that contributed to modeled portfolio returns exceeding 70% across selected positions

### 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

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Data Analysis, Excel Modeling, Microsoft Office Suite, Market Analysis

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

**Interests:** Hiking, Biking, Reading, Food, The Good Place, and Traveling

# Shaelyn G. Shields

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## EDUCATION

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### Columbia University

*Bachelor of Arts in Economics*

**New York, NY**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.2/4.0
- **Honors/Awards:** NCAA Division I Student-Athlete (Columbia University Swim and Dive Team)
- **Relevant Courses:** Intermediate Macroeconomics, Calculus III, Principles of Economics, Calculus I, University Writing
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

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## PROFESSIONAL EXPERIENCE

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### Morgan Stanley

*MAP Investment Banking Fellow*

**Remote**

*Mar 2026 – Present*

#### Selected Transaction Experience

- Vanta — *Security Compliance Automation Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1 of 75 NCAA athletes (~20%) to lead the full Execution Phase for a deal team of 5, directing valuation modeling, risk assessment, and financial analysis across ~5 workstreams/week to recommend Vanta as a strategic SaaS acquisition for MS
  - Analyzed 2+ precedent cybersecurity transactions totaling \$33B+ in enterprise value, benchmarking against ~2 SaaS valuation methodologies, EV/Revenue dynamics & margin expansion assumptions to improve the quality of team's final recommendation
  - Built a multi-pronged valuation/risk framework using 5+ institutional and industry sources, assessing enterprise adoption, compliance automation trends & competitive positioning across Vanta, CrowdStrike, and other industry peers to support thesis

### Athlete to Athlete

*Mentor*

**New York, NY**

*Oct 2025 – Present*

- Conduct 1-on-1 mentorship sessions with student-athletes focused on academic planning, athletic development and career readiness, delivering personalized goal-setting and accountability strategies that strengthen long-term confidence and personal growth outcomes
- Support 10+ student-athletes through discussions around mental resilience, time management and work-life balance, connecting peers with campus resources and wellness strategies that improve trust, communication and overall student-athlete well-being in high school

### Columbia Swim and Dive Instagram

*Social Media Manager*

**New York, NY**

*Oct 2025 – Present*

- Manage Columbia Swim & Dive social media platforms by publishing 3+ weekly content pieces tied to meets, athlete recognition and team culture, strengthening audience engagement and improving overall brand visibility across digital and campus-facing channels
- Develop strategic content calendars aligned with 5+ competitions and team milestones, analyzing engagement trends and performance metrics to optimize posting consistency, expand follower reach and strengthen platform-wide interaction quality across team accounts

### Private Swim Instruction

*Social Media Manager*

**Charlotte, NC**

*Jun 2024 – Aug 2024*

- Delivered biweekly 1-on-1 swim instruction through personalized in-home lesson plans and age-appropriate training activities, teaching water safety and technical fundamentals while building strong client relationships that strengthened trust/communication/efficiency

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Columbia Swim and Dive Team

*Varsity Student-Athlete*

**New York, NY**

*Sep 2025 – Present*

- Balance 20+ hours per week of Division I training, travel and competition alongside full-time academics, strengthening time management, discipline and performance consistency within a high-pressure collegiate athletics environment at Columbia University
- Collaborate with coaches and 20+ teammates during practices and collegiate meets, contributing to team performance through accountability, resilience and execution under pressure while strengthening communication and cross-functional teamwork skills

### Columbia Women's Business Society

*General Body Member*

**New York, NY**

*Sep 2025 – Present*

- Participate in 10+ professional development workshops, networking events and speaker sessions with industry professionals, strengthening business acumen, recruiting knowledge and long-term career readiness within competitive corporate environments

### Team IMPACT

*Volunteer*

**New York, NY**

*Sep 2025 – Present*

- Participate in a community outreach initiative supporting a child with special needs through 5+ team-led practices, events and social activities throughout the year, strengthening their sense of belonging + positive engagement across the broader team environment
- Build meaningful relationships with participating families through consistent involvement in swim practices and team programming, demonstrating empathy, leadership and interpersonal communication skills that strengthen long-term community impact efforts

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## SKILLS & INTERESTS

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- **Skills and Language(s):** Time Management, Coachable, Adaptable, Presentations, Teamwork, Leadership, Social Media
- **Programs:** Adobe Certified Professional, proficient in Microsoft Office Suite, Google Software/Applications
- **Interests:** Swimming, Cinema, Reading, History, Spending time with family and friends, and Music

# Sophia Wei

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## EDUCATION

### Harvard University

*Bachelor of Arts in Applied Mathematics, Economics, & Computer Science | Language Citation in Chinese*

Cambridge, MA

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.7/4.0
- **Honors/Awards:** NCAA Division I Student-Athlete (Volleyball), Gold Congressional Award Medalist, Cameron Impact Scholar Finalist, 3x AP Scholar with Distinction, 3x AIME Qualifier, Extemporaneous Speaking National Semi-Finalist
- **Relevant Courses:** Theoretical Linear Algebra & Real Analysis I/II, Probability, Statistical Inference, Big Data for Economics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

Selected Transaction Experience

Remote

*Mar 2026 – Present*

- Heidi Health — *AI Clinical Documentation & Workflow Automation Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1 of 75 NCAA athletes (~20%) to lead the full Control Phase for a 5-person deal team, consolidating healthcare AI diligence findings and validating investment assumptions to deliver a final client-ready recommendation to MS live on 6/8/2026
  - Evaluated 3 investment catalysts supporting Heidi Health's growth trajectory, analyzing 5x revenue expansion from \$4.2M to \$21.9M, 2M+ weekly consults and enterprise adoption signals tied to NHS deployments and Ministry of Health partnerships
  - Analyzed 3 competitive risks tied to AI-scribe commoditization and scalability, evaluating Epic and Oracle Cerner pressures while developing mitigants centered on multilingual workflows, enterprise integrations & healthcare-platform expansion efforts

### QueensGiant LLC

*Investment Banking Analyst*

New York, NY

*Jan 2026 – Present*

- Develop automated origination workflows across HubSpot and Apollo, streamlining lead sourcing, segmentation and outreach initiatives supporting targeted investor & operator engagement across 100+ prospective commercial real estate & fintech relationships
- Conduct ongoing market research across 3 core sectors including CRE, fintech and infrastructure, analyzing transaction activity, investment trends and emerging opportunities to strengthen deal sourcing, pipeline development and broader IB origination efforts

### Harvard Undergraduate Capital Partners

*Sourcing Analyst*

Cambridge, MA

*Jan 2026 – Present*

- Conduct sourcing and due diligence for one of the nation's largest intercollegiate VC organizations supporting 50 partner clients with \$27B+ AUM, strengthening venture-screening, market-research and early-stage investment evaluation skills across high-growth sectors
- Source early-stage opportunities for Great Wave Ventures across real-estate and construction technology markets, evaluating founder quality, market dynamics and investment potential to support pipeline development and venture-capital diligence initiatives

### Be The Light Youth Association

*Advisory Board*

Plano, TX

*Aug 2021 – Present*

- Advise a student-run 501(c)(3) organization that has raised \$250K+ supporting disadvantaged children and donated to 30+ nonprofits, strengthening community outreach strategy, leadership, and long-term organizational impact across fundraising operations
- Previously served as Executive Director and Head of Social Impact, leading outreach initiatives and coordinating speech-and-debate fundraising programs that expanded community engagement and strengthened operational support for underserved youth nationwide

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Harvard Women's Volleyball | NCAA Division 1

*Varsity Student-Athlete & Starting Setter*

Cambridge, MA

*Sep 2025 – Present*

- Compete as an NCAA Division I student-athlete while balancing 20+ hours per week of training, travel, recovery, and competition; Started at Setter for Harvard Women's Volleyball team & led the team with 468 assists, 23 aces + 167 digs as a true freshman in '25-26

### Harvard Financial Analysts Club

*Analyst*

Cambridge, MA

*Sep 2025 – Present*

- Analyze 25+ financial statements, industry trends and competitive dynamics for Harvard's largest undergraduate finance organization, strengthening valuation, market-research and investment-analysis capabilities through collaborative equity research initiatives

### Morgan Stanley

*2026 Next Play Program Attendee*

Remote

*Mar 2026 – May 2026*

- Selected for the Next Play Program, gaining exposure to investment banking, markets & wealth-management career pathways through structured professional-development programming and networking opportunities with firm professionals across multiple divisions

### Dallas Skyline Juniors Volleyball

*8x Team Captain*

Plano, 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

## NON-TECHNICAL SKILLS & INTERESTS

Skills: Java, Python, C++, SQL, R Studio, LaTeX, Microsoft Excel | Languages: Fluent in Mandarin Chinese

# Sunnie H. Wang

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## EDUCATION

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### Brown University

*Bachelor of Arts in Applied Math-Economics | Minor in Computer Science*

Providence, RI

*Expected Graduation: June 2029*

- **Cumulative GPA:** 4.0/4.0 | **SAT:** 1540
- **Honors/Awards:** NCAA Division 1 Student-Athlete (Women's Lacrosse), Brown Healthcare Investment Group Portfolio Implementation/Quant Analyst, Bruno Finance Society Freshman Cohort, Brown Derivatives Investment Group Associate
- **Relevant Coursework:** Linear Algebra, Integrated Intro to Computer Science, Multivariable Calculus, WSP Accounting Course

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## PROFESSIONAL EXPERIENCE

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### Bank of America

*MAP Investment Banking Fellow*

Remote

*Jan 2026 – May 2026*

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

- Komodo Health — *Healthcare Data & Analytics Platform (Healthcare Advisory | Capital Markets & Strategic Advisory Simulation)*
  - Led the Planning Phase for a 5-person deal team, structuring 3 secular drivers (aging-population demand, accelerating AI adoption, clinician shortages) into a macro investment thesis that positioned Komodo Health as a valuable PE acquisition target
  - Sized demographic & labor trends shaping sector fundamentals (i.e., 65+ population expansion, AI deployment across 70%+ of provider systems & 200K+ projected nurse gaps), translating these into durable demand signals that strengthened its positioning
  - Benchmarked 5+ implications across the healthcare stack, clarifying how aging-driven utilization, AI productivity lift, and workforce scarcity create structural tailwinds for Komodo, sharpening our 10-page deck and 3-page DDQ submission to BofA

### Hope Street Capital

*Search Fund Intern*

Providence, RI

*Sep 2025 – Dec 2025*

- Mapped 8–10 industries and screened 150+ companies through market sizing and competitive scans, producing a prioritized acquisition pipeline that guided weekly founder reviews and sharpened next-step sourcing focus across the full search cycle
- Synthesized financial, customer, and operational data across 40–60 target profiles into structured screening briefs, enabling founders to quickly evaluate fit and refine outreach strategy across multiple subsectors during the 12-week search cycle and diligence phase

### State National Companies (Markel Inc.)

*Business Development Intern*

Dallas, TX

*Jun 2025 – Aug 2025*

- Developed an AI-powered contract-extraction prototype using Python, OCR, and a Llama-3.2 RAG pipeline to vectorize 1,000+ clauses and surface variable commission terms, aligning model outputs with priorities discussed in 5+ executive briefings
- Built financial models assessing premium flows, loss ratios, and capital exposure across 10+ fronting and basic insurance programs, translating findings into actionable insights that informed business development decisions across the 8-week internship

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Brown Women's Lacrosse

*NCAA Division 1 Student-Athlete*

Providence, RI

*Aug 2025 – Present*

- Compete as a Division I lacrosse athlete balancing 20+ weekly training hours with a full academic course load, building discipline, resilience, and game-day execution while contributing to team strategy in a high-pressure, performance-driven environment
- Collaborate with 25+ teammates and coaching staff to execute scouting, film, and practice plans, strengthening communication and leadership skills while developing the consistency and competitive mindset required for sustained collegiate success

### DearPiggy | [Youtube Channel](#)

*Founder*

Dallas, TX

*Mar 2020 – Aug 2025*

- Built and scaled a custom educational YouTube channel with 130+ coding tutorials across five languages, generating 25,200+ views and 750+ watch hours by designing, scripting, and editing content for beginner and intermediate programmers worldwide
- Translated complex Java, JavaScript, Python, HTML/CSS, and DSA topics into clear, accessible lessons for a global learner base, developing a repeatable content pipeline and sharpening technical communication skills through consistent production

### Hockaday Upper School Student Council

*Executive President & Executive Financial Officer/Parliamentarian*

Dallas, TX

*Aug 2021 – May 2025*

- Led weekly Executive and Council meetings across four elected roles, coordinating initiatives with faculty and administrators while managing budgets, logistics, and school-wide programming that strengthened community engagement and student wellness
- Represented 1,000+ students in faculty and board forums, shaping policy updates and campus improvements while overseeing major events and long-standing traditions through coordinated cross-team planning, communication, and seamless execution

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## SKILLS & INTERESTS

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- **Programs:** Python, Java, C++, JavaScript, GitHub CoPilot, HTML & CSS, Llama LLM, ReasonML
- **Awards:** Uber Global Hackathon Global Finalist, Harvard WECODE Ambassador - Distinguished Initiative Award
- **Interests:** Sports, Running, Baking, Pickleball, Reading

# Taryn C. Reohr

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## EDUCATION

### Williams College

Bachelor of Science in Economics & Biology

Williamstown, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.67/4.0
- **Honors/Awards:** NCAA Division III Athlete (Varsity Soccer), Captained the 2024 MIAA D1 State Championship Team (1st in 20 Years), Five-Year Captain of Club Team, National Honor Society, Scholastic Art and Writing Awards (Honorable Mention)
- **Relevant Courses:** Psychology, Biology, Writing, Women's Gender & Sexuality Studies, Statistics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Present

#### Selected Transaction Experience

- Stripe — *Global Payments & Financial Infrastructure 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, consolidating fintech research & growth metrics into a final recommendation for MS evaluating Stripe's long-term desirability for a potential acquisition on 6/8
  - Assessed 3 investment themes supporting Stripe's scalable fintech ecosystem, analyzing exposure to 15–20% annual SaaS and cloud-spending growth, expanding product diversification and improving margin profile driving long-term earnings potential
  - Evaluated Stripe's competitive positioning within digital payments infrastructure, analyzing projected 25–30% YoY revenue growth, scalable financial-tool expansion & long-term customer retention advantages supporting a final "GO" recommendation

### Black & Blue Steak and Crab

Hostess (Seasonal)

Wellesley, MA

Feb 2025 – Present

- Coordinated guest seating, reservations and takeout operations for 50+ guests during high-volume dinner service, strengthening communication, customer-service and time-management skills while improving table-turnover efficiency and guest dining experiences
- Managed front-of-house operations and closing responsibilities for 50+ guests per shift, strengthening organization, multitasking and hospitality skills while maintaining a welcoming atmosphere & consistent operational standards across busy restaurant-service periods

### Playa Bowls

Shift Leader (Seasonal)

Wellesley, MA

Feb 2024 – Present

- Coordinated team workflows and prep stations during high-volume shifts serving 100+ customers daily, reducing customer wait times while strengthening leadership, multitasking & operational-management in a fast-paced food-service operations + peak service periods
- Supervised and trained 10+ team members across daily operations, cash handling and inventory management, strengthening communication, organization & customer-service skills while supporting accurate store closings/balanced daily deposits in busy season

### The Cottage

Hostess

Wellesley, MA

Feb 2024 – Sep 2025

- Managed reservations, waitlists and guest seating for 50+ guests during peak dining hours, strengthening communication, organization & customer-service skills while supporting efficient table distribution & smooth restaurant operations throughout busy service periods
- Facilitated takeout coordination and front-of-house guest interactions for 40+ customers per shift, strengthening multitasking, professionalism and operational-support skills within a fast-paced hospitality environment during high-volume dining operations

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Williams College | Varsity Women's Soccer

NCAA Division III Student-Athlete

Williamstown, MA

Aug 2025 – Present

- Balance a rigorous Williams College academic workload while dedicating 20+ hours/week to varsity soccer training, travel and competition, strengthening discipline, resilience and time-management skills within a nationally competitive Division III environment
- Build upon a decorated high-school and club soccer career that included captaining a state-championship program and serving as a 5-year club captain, strengthening leadership, communication and accountability skills through elite regional/national-level competition

### Wellesley Village Church

Confirmation Advisor

Wellesley, MA

Sep 2024 – Jun 2025

- Mentored middle-school students throughout their confirmation journey by facilitating discussions on faith development and biblical teachings while planning 10+ group activities and reflection sessions, strengthening leadership, mentorship and public-speaking skills

### The Journey Peer Support Program

Student Advisor

Wellesley, MA

Sep 2023 – Jun 2025

- Mentored 15+ younger students through advisory-group discussions and peer-support programming, strengthening leadership, communication and mentorship skills while fostering an inclusive and supportive environment through weekly designed touchpoints
- Designed and led 10+ team-building activities alongside fellow student mentors, strengthening collaboration, program-development & relationship-building skills while improving engagement across advisory-group initiatives/peer-focused community-building events

## NON-TECHNICAL SKILLS & INTERESTS

**Programs & Volunteerism:** New England Surf Soccer Club, Off the Rocks Animal Shelter, OPS Soccer, Village Table

**Interests:** Business, Medicine (Sports Orthopedics), Soccer, Animals

# Tim D. Churchill

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## EDUCATION

### Amherst College

Bachelor of Science in Mathematics & Chemistry

Amherst, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.9/4.0 | **SAT:** 1580
- **Honors/Awards:** Highest Academic Distinction, National Merit Scholarship Finalist, AP Scholar with Distinction, 9 Varsity Letters, Elected Captain of Varsity Cross Country, Varsity Skiing, Varsity Track and Field, Prefect, 4xAll ISL, 3x All NESCAC
- **Relevant Courses:** Linear Algebra, Groups Rings and Fields, Thermodynamics and Kinematics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

MAP Investment Banking Fellow

Remote

Mar 2026 – Present

#### Selected Transaction Experience

- Vanta — *Security Compliance Automation Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1/75 NCAA athletes (~20%) to lead the Monitoring Phase for a 5-person deal team, synthesizing diligence findings, revenue trends and AI-commercialization insights into a final investment recommendation delivered live to MS bankers on 6/8
  - Evaluated 4 investment drivers supporting Vanta's enterprise expansion strategy, analyzing 95%+ subscription revenue, accelerating ARR growth from \$100M - \$300M & AI-enabled workflow improvements driving stronger monetization/scalability
  - Monitored Vanta's accelerating revenue trajectory and enterprise-market positioning, analyzing ARR growth timelines from \$10M→\$100M in 2 years, \$100M→\$200M in 15 months and \$200M→\$300M in 9 months to support long-term expectations

### The Goldminer's Daughter Lodge

Dining Room Server

Alta, UT

Dec 2024 – Mar 2025

- Served 50+ tables per shift within a high-volume luxury ski lodge, communicating in English and Spanish while strengthening customer-service, multitasking and teamwork skills in a fast-paced hospitality environment during peak winter tourism operations
- Maintained efficient dining-room operations by clearing tables, supporting service flow and assisting guests across busy meal periods, strengthening adaptability, communication & time-management skills in a high-turnover hospitality setting during peak service hours

### Nobles Day Camp

Swing Counselor

Dedham, MA

Jun 2024 – Aug 2024

- Adapted daily to new camper groups ages 6–13 while coordinating activities and building relationships, strengthening leadership & communication skills through high-energy programming in a fast-paced camp environment with constantly changing group dynamics
- Earned the "You're a Hoot" award as 1 of the top 3 counselors of the week (~Top 2%), recognized for leadership, adaptability and ability to foster positive camper engagement across rapidly changing group dynamics & diverse camper personalities for a full summer

### 23 Cubed

Junior Developer

Boston, MA

Jun 2022 – Aug 2022

- Developed and deployed 4 client websites using Webflow, JavaScript, CSS and HTML, strengthening technical-development and problem-solving skills while supporting digital client solutions across multiple business projects and assisting with client sales calls

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Olshanksy Chemistry Lab

Researcher

Amherst, MA

Jan 2026 – Present

- Synthesized 10+ quantum-dot particle samples supporting carbon-capture processing research while utilizing fluorescence spectroscopy tools to evaluate particle performance, strengthening laboratory-analysis/data-interpretation/experimental-research skills

### Amherst Cross Country and Track & Field

NCAA Division III Varsity Athlete

Amherst, MA

Sep 2025 – Present

- Commit 20+ hours/week year-round to Division III cross-country and track training, building discipline, resilience and endurance while balancing rigorous academics within Amherst's nationally competitive athletic environment and demanding travel schedule

### Amherst College Leadership & Emergency Response

Senator & Med 3

Amherst, MA

Sep 2025 – Present

- Participate in weekly student-governance meetings as an elected Senator while serving on 4 campus committees focused on mental health, sustainability, appointments and Honor Code reform, strengthening leadership, policy-analysis and community-advocacy skills
- Completed a 26-day EMT certification program before serving 12-hour MED-13 shifts responding to on-campus emergencies, strengthening crisis-management, communication and teamwork capabilities through hands-on emergency medical and campus-safety

### Samaritans Crisis Services

Helpline Volunteer

Remote

Aug 2023 – May 2024

- Completed 40+ hours of crisis-response training before conducting weekly 3-hour helpline shifts, assessing suicide risk and supporting callers through 10–60+ minute conversations while strengthening empathy, communication and decision-making skills under pressure

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Python (pandas, NumPy, tkinter, TensorFlow), Webflow, Google Suite | **Languages:** English, Spanish

**Certifications:** EMT, Wilderness First Aid; Spanish Translation and Interpretation for Kids in Need of Defense (K.I.N.D.)

# Trenton C. Cassens

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## EDUCATION

### Emory University

*Bachelor of Business Administration, Bachelor of Arts in Economics*

**Atlanta, GA**

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.66/4.0
- **Honors/Awards:** NCAA DIII Student-Athlete (Men's Swimming & Diving Team), NISCA Academic All-American & Athletic All-American, USA Swimming Academic All American, FAA Remote Pilot Certification & QuickBooks Certification
- **Relevant Courses:** Financial Accounting, Data and Decision Analytics, Marketing, Wall Street Prep Accounting Certification

## PROFESSIONAL EXPERIENCE

### Eagle Swim Club (ESC)

*Assistant Coach*

**Atlanta, GA**

*Aug 2025 – Present*

- Coach and mentor 20+ swimmers ages 6–13, focusing on stroke mechanics, endurance training, and race strategy while reinforcing teamwork & discipline during structured swim practices across multiple seasonal youth training groups + competitive review sessions
- Design and lead warm-ups, drills, and individualized workouts across 4+ weekly training sessions, supporting athlete development and improving competitive readiness for youth swim meets through progressive conditioning and technique-focused instruction

### Bank of America

*MAP Investment Banking Fellow*

**Remote**

*Jan 2026 – May 2026*

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

- Option Care Health — *Home Infusion Therapy Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
  - Led Planning Phase financial summary for Option Care Health, structuring key demand drivers including a 40% projected increase in the US 65+ population (58M→82M by 2050), Medicare Advantage enrollment reaching 54% + rising chronic disease
  - Built banker-style snapshot evaluating revenue scale, margin structure, and healthcare KPIs using FY2025 preliminary financial results and Q3 balance sheet data, identifying cost drivers (i.e., labor shortages, specialty drug pricing) for final recommendation
  - Identified 3 key operating risks including reimbursement pressure, staffing shortages, and pharmaceutical cost volatility while outlining KPIs to monitor patient volume growth, margin stability, and payer mix shifts to guide the team's downstream work

### Klein Coding Academy

*Course Instructor*

**Houston, TX**

*Jun 2023 – Jul 2025*

- Designed and delivered Python programming lessons for 40+ middle school students, introducing coding fundamentals through structured instruction and interactive exercises during weekly after-school education sessions focused on beginner-friendly CS learning
- Guided students through 5+ project-based coding modules, strengthening problem-solving skills and helping learners build functional programs using Python fundamentals across collaborative classroom programming activities and hands-on coding demonstrations

### PACK Special Olympics

*Assistant Coach*

**Houston, TX**

*Jun 2022 – Jul 2025*

- Supported 35+ athletes with intellectual and developmental disabilities during swim practices and competitions, fostering an inclusive and encouraging training environment through individualized instruction and supportive coaching techniques during weekly practices
- Assisted with event logistics across 10+ swim meets, coordinating setup, timing operations, and athlete support to ensure smooth and accessible competition experiences for participants, coaches, and event organizers throughout the competitive swim season

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Emory University Swimming & Diving

*Varsity Swimmer*

**Atlanta, GA**

*Sep 2025 – Present*

- Compete as a varsity swimmer for Emory's nationally ranked NCAA program, participating in 20+ weekly training hours across practices, lifts, and meets while contributing to team preparation and competitive performance in collegiate competition
- Balance a full academic course load with 20+ hours of weekly swim training, demonstrating time management, resilience, and discipline while collaborating with coaches and 30+ teammates to strengthen team culture and collective competitive performance

### Emory Student Alumni Board

*Board Relations Member*

**Atlanta, GA**

*Sep 2025 – Present*

- Strengthen Emory's alumni network by coordinating 5+ student-alumni engagement initiatives, supporting professional development events and fostering meaningful connections between undergraduate students and the alumni community through targeted outreach
- Represent the undergraduate student body in board discussions and outreach programs, collaborating with 10+ board members and alumni leaders to expand participation in mentorship, networking & philanthropic initiatives supporting long-term alumni engagement

### Matriculate

*Advising Fellow*

**Atlanta, GA**

*Sep 2025 – Present*

- Selected through a competitive application process to advise 4 high-achieving, low-income students, providing guidance on college applications, financial aid strategy, and academic goal setting through structured mentoring and college-access advising support
- Conduct weekly advising sessions with students to support essay development, school selection, and application planning, helping mentees navigate the college admissions process and strengthen readiness for selective universities through individualized mentorship

## NON-TECHNICAL SKILLS & INTERESTS

**Programming:** Python, Java, JavaScript, R Script | **Certifications:** QuickBooks Certification, FAA Remote Pilot

**Language:** English (Native), Spanish (Limited) | **Interests:** Travel, Personal Finance, Golf, Swimming, Hiking, Drone Piloting

# Victoria X. Gao

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## EDUCATION

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### Columbia University

*Bachelor of Arts in Financial Economics*

**New York, NY**

*Expected Graduation: June 2029*

- **Cumulative GPA:** 3.85/4.0 | **SAT:** 1550
- **Honors/Awards:** NCAA Division 1 Student-Athlete (Women's Volleyball), 2025-26 Dean's List
- **Relevant Coursework:** Intermediate Macroeconomics, Principles of Economics, Calculus III, Calculus-Based Intro to Statistics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (completed 05/2026)

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## PROFESSIONAL EXPERIENCE

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### Foothill Ventures

*Incoming Early-Stage Venture Summer Analyst*

**Los Altos, CA**

*Jun 2026 – Aug 2026*

- Joining Foothill Ventures as a Summer Analyst to support the team in making early-stage investments in infrastructure/AI applications

### Bank of America

*MAP Investment Banking Fellow; Team Captain*

**Remote**

*Jan 2026 – May 2026*

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

- Delcath Systems — *Oncology Drug-Delivery Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
  - Led Initiation Phase 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 3/23/26
  - Developed a macro healthcare landscape assessment referencing ~\$9.0T global TAM (2024–2025) and ~\$8.9T serviceable market, prioritizing Pharmaceuticals (7.4% share)/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 ~5 key industry peers (Keytruda, Opdivo/Yervoy, and Sorafenib) to inform diligence priorities

### Lionsbridge Financial Fellowship

*Columbia University Center for Career Education Fellow*

**New York, NY**

*Nov 2025 – Dec 2025*

- Selected as 1 of 54 participants for a 3-day accounting, finance, and valuation bootcamp led by Chris McGowan, building a financial model and analyzing Peloton statements to strengthen fundamental skills required across IB deal and pitch processes
- Collaborated in multi-team workshops, site visits with 3 finance firms, and peer modeling sessions to interpret key drivers and KPIs, improving analytical fluency, communication, and readiness for analyst-level responsibilities in investment banking

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Columbia Women's Volleyball

*NCAA Division 1 Student-Athlete*

**New York, NY**

*Aug 2025 – Present*

- Dedicate 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 every match 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 2021 – 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
- Oversaw practice flow, communication standards, and performance expectations while meeting regularly with coaches to refine priorities, enhancing group cohesion, accountability, and the clarity needed to sustain competitive momentum

### 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 & demands

### 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

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## SKILLS & INTERESTS

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- **Programs:** Microsoft Excel, PowerPoint
- **Skills and Language(s):** English (Fluent), Chinese - Mandarin (Fluent), Spanish (Intermediate; 8 years of study)
- **Early Insight Program(s):** 2026 Goldman Sachs Possibilities Series, 2026 Guggenheim Freshman Day on the Job
- **Interests:** Watching football, spending time with friends and family, traveling, trying new activities, meeting new people!

# Washington T. Chung

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## EDUCATION

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### Georgetown University

*Bachelor of Arts in Business Administration*

Washington, DC

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.54/4.0 | **ACT:** 34
- **Honors/Awards:** NCAA Student-Athlete (Men's Varsity Rowing), John Carroll Baran, Ignatian GU, Moran Family Rowing Scholar, Wings of Eagle, Barnard Family Memorial, Marine Corps Scholarship Foundation Semper Fidelis Leadership
- **Relevant Courses:** Financial Accounting, Economics, Calculus, Management, Operations and Analytics
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

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## PROFESSIONAL EXPERIENCE

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### Echo Health

*Incoming Finance Intern*

Westlake, OH

*Jun 2026 – Aug 2026*

- Selected for a finance internship supporting a healthcare payments network processing \$200B+ in annual transaction volume across 1.6M+ provider and vendor relationships, gaining exposure to large-scale financial operations and payment infrastructure systems
- Expected to analyze healthcare payment data using Excel and financial reporting tools to reconcile transaction flows, track KPIs and identify opportunities to improve operational efficiency and reduce processing inefficiencies across several payment workflows

### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- Stripe — *Global Payments & Financial Infrastructure 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 Stripe by structuring 5+ financial assumptions tied to digital payments growth/AI-powered fraud prevention/long-term fintech scalability
  - Defined 5+ diligence priorities for a 5-person deal team, including pricing sensitivity, macro exposure, competitive fintech pressures and dependence on new product expansion, enabling downstream workstreams to pressure-test assumptions & thesis
  - Built 4+ banker-style exhibits evaluating Stripe's embedded AI capabilities, payments ecosystem and expansion into financial automation tools, establishing frameworks around margin trajectory, take-rate sustainability and durable competitive positioning

### Georgetown University Alumni and Student Federal Credit Union

*Director*

Washington, DC

*Aug 2025 – Present*

- Manage a 40+ intern Auxiliary Department at the world's largest entirely student-run financial institution, supporting operations tied to \$20.1M in peak AUM while leading/directing workshops and partnerships across multiple Georgetown campus clubs/organizations
- Led 5+ financial literacy initiatives and completed a semester-long project launching metal debit and holiday cards for many high-value members, strengthening member engagement, operational strategy and product development in a student-run banking environment

### York and Sprague, LLC

*Office Administrator*

North Royalton, OH

*May 2022 – Aug 2025*

- Oversaw spending accounts and financial operations for a \$1.1M service-industry business while reconciling 2,000+ transactions, maintaining budget alignment & balanced financial records that contributed to company's first-time audit approval + stronger accuracy

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Georgetown University | NCAA Division I Men's Rowing

*Varsity Student-Athlete*

Washington, DC

*Aug 2025 – Present*

- Commit 30+ hours weekly to Division I rowing through training, travel and competition across 13 annual races, earning an \$80K athletic scholarship while placing 8th internationally at 2025 Head of the Charles Regatta & earning invitation to U19 USRowing Camp

### Marine Corps Scholarship Foundation

*Member*

Washington, DC

*Jul 2025 – Present*

- Selected as 1 of 4 students from ~20,000 eligible applicants for the Marine Corps Scholarship Foundation's premier leadership scholarship, recognizing academic achievement, leadership potential & sustained commitment to service initiatives + civic engagement
- Participated in 5+ networking and leadership events across Chicago and Washington, D.C., engaging with military officers and business leaders to strengthen professional communication, mentorship and leadership development skills in professional settings

### NASA Engineering Institute

*Researcher*

Cleveland, OH

*Aug 2023 – May 2025*

- Designed and programmed solar power circuits in C++ for lunar modules, enabling automatic power rerouting under low-energy conditions to support NASA's Power Management and Distribution research initiatives for space systems applications and testing
- Collected and analyzed telemetry data from 10+ circuit prototypes while collaborating with NASA engineers during biweekly technical reviews, strengthening systems analysis/technical communication/iterative engineering problem-solving skills across engineering teams

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## SKILLS & INTERESTS

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- **Skills and Language(s):** Proficient in Microsoft Office Suite, Java (AP Computer Science), C++
- **Interests:** Cleveland Sports Fan, Violinist, Social Media Brand Ambassador, Vinyl Collector, Wes Anderson Movies, Skiing

# William L. Kruse

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## EDUCATION

### University of Pennsylvania | Wharton School of Business

*Bachelor of Science in Economics | Concentration in Finance and AI for Business*

Philadelphia, PA

*Expected Graduation: May 2029*

- **Cumulative GPA:** 3.93/4.0
- **Relevant Courses:** BEEP 2500: Managerial Economics, MATH 1400: Calculus Part I
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

*MAP Investment Banking Fellow*

Remote

*Mar 2026 – Present*

#### Selected Transaction Experience

- Databricks — *Enterprise Data & AI Platform (Tech M&A / Strategic Advisory Simulation)*
  - Selected as 1 of 75 NCAA athletes (~20%) to lead the Monitoring Phase for a deal team of 5, synthesizing AI-infrastructure research, valuation assumptions & operational analysis into a final thesis recommending Databricks as a target acquisition to MS
  - 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 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 MS

### Student-Athlete Investment Club

*External Events Committee Member*

Philadelphia, PA

*Jan 2026 – Present*

- Host 5+ speaker events and fireside chats while maintaining alumni relationships, strengthening communication, networking and event-planning skills by coordinating 5-10 finance-focused programs for student-athletes interested in pursuing careers in high-finance
- 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

### Wharton Undergraduate Finance Club (WUFC)

*Case Team Participant*

Philadelphia, PA

*Jan 2026 – Present*

- Participate in 10+ weekly workshops covering financial multiples and comparable-company analysis, strengthening technical valuation, financial-modeling and analytical skills through collaborative finance-case training sessions and peer-driven investment discussions
- Collaborated with 5+ peers to analyze complex financial case studies and develop data-driven forecasting models, strengthening teamwork, presentation and investment-recommendation skills using real-world company and market data in simulated deal scenarios

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Penn Quakers Men's Basketball

*NCAA D1 Student-Athlete*

Philadelphia, PA

*Sep 2025 – Present*

- Balance a rigorous academic workload while dedicating 20+ hours/week to varsity athletic commitments, strengthening discipline, resilience and time-management skills through practices, travel, meetings and competition throughout demanding in-season schedules
- Engaged with 10+ former Penn athletics alumni through Penn Champions Club programming, strengthening networking, communication and professional-development skills while gaining exposure to careers in financial services and business leadership

### Penn Athletics Wharton Leadership Academy (PAWLA)

*Participant*

Philadelphia, PA

*Sep 2025 – Present*

- Selected as 1/25 student-athletes for a leadership-development program through a partnership between Penn Athletics and Wharton, strengthening strategic-thinking, accountability and communication skills through team-focused leadership workshops and case studies
- Collaborated with 10+ student-athletes in workshops focused on team dynamics, decision-making and performance leadership, strengthening teamwork, adaptability and organizational skills within high-performance athletic environments and competitive settings

### Norwegian Basketball Federation

*Basketball Coach*

Asker, Norway

*Jun 2023 – Jun 2025*

- Coached youth athletes at Norway's largest basketball camp serving 600+ participants annually, strengthening leadership, communication and player-development skills by instructing multiple age groups across daily practices & competitive training sessions
- Led 3 daily basketball practices focused on skill development and teamwork, strengthening organizational, mentorship and coaching capabilities while supporting athlete growth within a structured competitive training environment for developing youth players

### Norwegian Basketball Federation

*Professional Basketball Player, National Team*

Oslo, Norway

*Feb 2023 – Jun 2025*

- Selected as 1 of 12 players to represent Norway in international basketball competitions, strengthening leadership, teamwork and competitive-performance skills through participation in European championship-level events in multiple international tournaments
- 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

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Python, Wall Street Prep Premium Package: LBO, DCF, M&A, Financial Statements Modeling | **Languages:** Norwegian and English (Native proficiency in both) | **Interests:** Basketball, Basketball coaching, Cross-country skiing, "Suits", Weightlifting

# William T. Olsen

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## EDUCATION

### Tufts University

Medford, MA

Bachelor of Science in Physics; Computer Science | Minor in Finance

Expected Graduation: May 2029

- **Activities:** Student-Athlete (XC/T&F), Biotech Club Mentee; Data Science Fellow; Jumbo Ventures
- **Relevant Courses:** Cells and Organisms; Intro to Finance; Physics; The Business of Drug Development
- **Finance Certification(s):** Wall Street Prep Accounting & Financial Statement Analysis (ongoing)

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

Remote

MAP Investment Banking Fellow

Mar 2026 – Present

#### Selected Transaction Experience

- Vanta — Security Compliance Automation Platform (Tech M&A / Strategic Advisory Simulation)
  - Selected as 1/75 NCAA athletes (~20%) to lead the Planning Phase for an MS-case, analyzing Vanta by structuring 5+ financial assumptions tied to ARR growth, compliance automation demand & long-term scalability across cybersecurity software markets
  - Built 4+ banker-style exhibits evaluating Vanta's AI-driven compliance platform, recurring SaaS revenue model and competitive positioning, establishing frameworks around pricing power, margin durability, and long-term value creation within cloud security
  - Defined 5+ diligence priorities for a 5-person deal team, including regulatory risk, market saturation, private-company financial visibility & differentiation versus competitors, enabling downstream workstreams to stress-test assumptions/refine team's thesis

### University Orthopedics and Brown Health | Hospital and Orthopedic Surgery Center

Providence, RI

Assistant and Intern

May 2024 – Jul 2025

- Shadowed an orthopedic surgeon across 7–10 daily patient visits, observing musculoskeletal evaluations, imaging review and treatment planning while strengthening understanding of post-surgical care, chronic injury management and clinical decision-making workflows
- Supported patient experience by assisting 10+ patients daily with mobility devices and helping patients communicate symptoms effectively, improving exposure to patient interaction, healthcare operations and multidisciplinary coordination in a fast-paced setting

### Academy Physical Therapy | Sports Performance Physical Therapy Clinic

Providence, RI

Assistant and Intern

Aug 2022 – Jul 2025

- Guided 15+ patients weekly through therapist-prescribed rehabilitation programs, ensuring proper form and exercise execution across post-surgical & musculoskeletal recovery plans within a sports performance physical therapy environment serving athletes/individuals
- Reviewed 10+ patient histories alongside supervising therapists to identify recovery plateaus and recommend care-plan adjustments, strengthening analytical thinking, communication skills and understanding of rehabilitation progress monitoring processes across cases

## LEADERSHIP & COMMUNITY DEVELOPMENT

### Tufts University | Cross Country and Track | NCAA Athletics

Medford, MA

Varsity Student-Athlete

Aug 2025 – Present

- Contributed to a 2025 NESCAC Conference Championship while balancing 25+ hours weekly of training, travel and competition alongside a full academic course load within a high-performance collegiate athletic environment throughout year-round competition
- Earned 7-time Nationals Qualifier honors alongside multiple All-New England and All-State selections, demonstrating sustained elite performance, leadership and competitive consistency as a 3-time team captain and school record holder across regional/national stages

### Gooseberry Beach | Operations and Management

Newport, RI

Lifeguard Captain

May 2020 – Aug 2025

- Managed a team of 5 lifeguards while collaborating with senior management to improve daily beach operations, strengthen safety protocols and maintain efficient coordination across high-traffic summer environments during peak seasonal attendance periods
- Maintained CPR, First Aid and Rhode Island State Surf Rescue certifications across 5 consecutive seasons, demonstrating reliability, emergency preparedness and composure while ensuring swimmer safety in dynamic coastal conditions + in unpredictable emergencies

### Leadership Academy | School Operations and Developmental Projects

Warwick, RI

Senior Member

Aug 2022 – Jun 2024

- Managed a charity-centered snack bar operation generating \$5K+ annually for local nonprofits while leading civic engagement research projects and strengthening operational, leadership and project management skills across community initiatives and outreach
- Participated in 10+ leadership seminars and executive discussions with professionals from CVS, HealthCor and KLR, building commercial awareness, communication skills and exposure to organizational leadership and strategic decision-making processes

## PROJECTS

### AI Predictive Model Construction | Northfield Mount Hermon

Providence, RI

- Built linear regression and deep neural network models predicting heart disease development with 80%+ accuracy for the high school

### Board Member and Advisor | Be Great For Nate Inc

Providence, RI

- Led fundraising initiatives generating \$300K+ for youth mental health programs while supporting advocacy efforts in Rhode Island

## NON-TECHNICAL SKILLS & INTERESTS

**Skills:** Python, Microsoft Excel, PowerPoint, Wet Lab Techniques | **Interests:** Reading (Atomic Habits, The Ritual Effect, The Pharmacopoeia Guide); Skiing, Surfing, Sailing, Travel, Fitness. Technology