

AMIRA SINGH

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EDUCATION

Harvard University – Cambridge, MA

GPA: 3.81/4.0

B.A. in Statistics | Minor in Economics | SAT: 1500

Anticipated Graduation: May 2025

- **Accomplishments:** NCAA Division I Student-Athlete (Harvard Women's Squash Team); 2021-22 Ivy League & National Champion; Ranked India no. 1 & no. 2 in Asia in Girls Under-19 (Sep' 21); Represented India at World Junior and Asian Junior Championships
- **Relevant Courses:** Corporate Finance, Corporate Financial Accounting, Intro.n to: Econometrics, Probability, Statistics and Data Science
- **Industry Education:** Building a Financial Model, Core Data Analysis, Core Financial Concepts, Finance Interview Prep, Valuation 1: DCF
- **Leadership Events:** Participated in Leadership Events with Bank of America, Deloitte, Evercore, Oliver Wyman & JP Morgan Chase & Co.

EXPERIENCE

Harvard University Statistics Department – *Teaching Fellow/Course Assistant* | Cambridge, MA

08/2022 – Present

- Plan and teach the course material for an introductory statistics course to ~ 12 students in weekly sections by reviewing material taught by the professor using different teaching methods to increase their intuition, and host weekly office hours to address and clarify all queries
- Assess the proficiency of the student's grasp of course material by grading problem sets, midterms and final exams and conducting oral exams and then provide strategic feedback to help motivate the students to improve their scores & increase their grasp of course material
- Discuss effective teaching methods and debrief on the progress of students in my section through office hours with other members of the teaching team, including the professor and head teaching fellow weekly to give and receive constructive feedback on any teaching methods
- Mentor 2 new members of the teaching team by meeting and checking in with them weekly to discuss the teaching methods they have been implementing and resolve any queries they may have, promoting an open and collaborative learning space with new members of the team

DICK'S Sporting Goods – *Management Student Consultant; Scrum Master* | Remote

01/2023 – 02/2023

- Designed a national marketing campaign to promote DSG's products to 100K+ new female customers for Women's History Month in 2023
- Oversaw the scrum/development team, ensuring all 5 members executed the plan to increase Q1 net sales of women apparel by 6.6% for '23
- Led weekly all-hands meetings to advise scrum implementations, i.e., 7 Ps of Marketing Mix, 'IDIC' CRM Model, Lewin's 3-Stage Model
- Submitted a project closure report/scrums guide (including 12-slide PowerPoint) to DSG's Sales team to formally close the project/phases
 - Technical Skills Acquired: Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development

HCL Enterprise – *Strategy & Marketing Intern* | Noida, India

06/2022 – 07/2022

- Researched extensively to create interactive and creative social media content to increase awareness of the HCL Squash Podium program
- Produced outlines to successfully come up with and share unique social media content on the HCL enterprise Instagram to increase interaction with the HCL for sports social media pages to promote the HCL Squash Podium program and HCL Sports initiative
- Facilitated the successful planning of a cyclothon event by HCL, the first of its kind by a major company in India, to break into a new niche in the sporting industry by conducting extensive research into the operations and financials of domestic and international cyclothon events

LEADERSHIP & COMMUNITY DEVELOPMENT

Harvard College Impact Investing Group – Co-Director of Investments | Cambridge, MA

09/2022 – Present

- Mobilized the process of establishing the first ever student-run impact fund from scratch at Harvard by comparing different ways of establishment and working through the administrative challenges of incorporating a new organization & overseeing daily activities
- Coordinate several initiatives (i.e., setting up research fellowships, speaker events, recruiting events & partnerships with prominent industry professionals in the impact investing space), successfully hosting 2 events with leading professionals in impact investing
- Restarted and revamped the Harvard College Impact Investing Group on campus with a new set of board members and committee members, overseeing an investments team focused on the practical area of impact investing and on the establishment of an impact fund

Harvard International Review – Comptroller, Operations Lead, Comp Director | Cambridge, MA

09/2021 – 01/2023

- Oversaw and implemented the accurate accounting and financial reporting in the HIR (a 5-figure business) for the fiscal year, while managing the annual budget, securing grants for the club, and maintaining a bird's-eye view of the organization's overall financial picture
- Facilitated the back-end operations on the business side of the HIR, including agency relations and increasing income from royalties, while also managing the distribution of the magazine to over 600,000 readers in 60+ countries through online and physical channels
- Coordinated and led an education-based process over 2 months to initiate ~20 members as staff writers for the HIR by teaching the new writers about the organization and the writing process for the magazine over the first ever summer initiation process
- Digitized the apple news feed of all HIR articles as part of a team responsible for expanding digital presence and overall expansion efforts

Foundation for Indian Contemporary Art (FICA) – Volunteer | Delhi, India

04/2020 – 10/2020

- Mobilized a fundraising initiative to support the migrant labor affected by the pandemic during the Covid-19 lockdown for the NGOs Goonj And Karwan-E-Mohabbat and raised awareness about the consequences of the pandemic on the migrant labour in Delhi
- Acquired and raised \$80,000 as part of the fundraising team to support those most affected during the Covid-19 pandemic, which was used in 12 states in India running community kitchens, providing dry rations to migrant labor and cooked food to Delhi's homeless
- Strengthened the fundraising campaign for FICA by increasing the number of communication channels the fundraiser was being promoted in and increasing the accessibility of the fundraiser to surpass our goal and raise \$80,000

ANGEL YOU

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EDUCATION

Harvard University – Cambridge, MA

GPA: 3.5/4.0

B.S. in Applied Mathematics and Economics

Anticipated Graduation: May 2025

- **Accomplishments:** NCAA Division I Student-Athlete (Harvard University Women's Tennis); Earned 5-Star Rating on Tennis Recruiting
- **Relevant Courses:** Introduction to Macroeconomics and Microeconomics, Linear Algebra, Mandarin (Fluent), Multivariable Calculus
- **Industry Education:** Building a Financial Model, Core Data Analysis, Core Financial Concepts, Finance Interview Prep, Valuation 1: DCF

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design business presentations for Fortune 500 companies
- **Agile Development:** managed a team of 5 as scrum master, introducing short-term deliverables to improve the project
- **Performance Management:** ensured scrum team's outputs & daily activities met UHG's goals to launch new program
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in sprints to coordinate project activities and track goals, milestones, and OKRs

EXPERIENCE

United Health Group – MAP Corporate Strategy Student Consultant; Scrum Master | Remote

12/2022 – 02/2023

- Designed a national “doula program” for UHG to positively impact 10k+ BIPOC mothers for Black Maternal Health Week between '23-26
- Oversaw the scrum/development team, ensuring all 5 members executed the plan to drive & enhance UHG's maternal healthcare initiative
- Led weekly all-hands meetings to advise scrum implementations (i.e., MARACA model, McKinsey's 7-S model & 7 Ps of marketing mix)
- Submitted a project closure report/scrums guide (including 12-slide PowerPoint) to UHG's senior leadership to formally close the project

The Kraft Heinz Company – Growth & Operations Student Consultant | Remote

08/2022 – 10/2022

- Created a multi-year financial profile to return Kraft Heinz to consistent growth on both the top/bottom lines & support growth initiatives
- Introduced streamlined approaches to save \$2B through '24 (i.e., fewer ingredients) & capitalize on consumer's desire for healthier options
- Provided a long-term financial algorithm to help Kraft achieve adjusted EBITDA growth of 2% – 3% & adjusted EPS growth of 4% – 6%
- Leveraged Kraft's new platform structure to help the company accelerate its strategic plan and reduce net leverage to below 4x consistently

Morgan Stanley – Firmwide Strategy Student Consultant | Remote

07/2022 – 08/2022

- Created a multi-channel financial wellness program for MS's Strategy & Operations team to enhance employee relationships post-COVID
- Introduced several initiatives (i.e., digital financial portal) to assess & address the financial concerns of Black/Hispanic workers at the bank
- Developed a 3-year action plan to reduce the % of Black/Hispanic workers worried about their financial futures from 61% to <50% by '25
- Presented results to MS's Strategy & Ops. team leveraging Pyramid & MECE principles to subdivide PowerPoint slides into small subsets

Credit Suisse – HBCU Recruiting Student Consultant; Scrum Master | Remote

06/2022 – 07/2022

- Created a 3-year redesign strategy/roadmap to increase the % of HBCU applicants to summer internships and entry-level roles at the bank
- Led weekly all-hands meetings to advise scrum implementations (i.e., S.M.A.R.T. goals, McKinsey's 7-S model & HubSpot flywheel)
- Submitted a project closure report/scrums guide (including 12-slide PowerPoint) to CS's recruitment team to formally close the project

Heineken USA – Strategy & Insights Student Analyst | Remote

03/2022 – 05/2022

- Created a go-to-market strategy for Heineken USA that outlined the clear action plans and steps needed to succeed in the U.S. marketplace
- Developed a strategic implementation roadmap to visualize the key outcomes needed to achieve 15% beer volume growth by the end of '23
- Led benchmark analysis to compare Heineken's performance in the U.S. to other F&B companies with significant market share in the U.S.
- Established a focused cost-reduction program to lower Heineken's overall-cost base/solve profitability challenges against a \$34MM budget

Tennis Coach – Self-Employed | Chantilly, VA

06/2021 – 05/2022

- Developed individualized training programs for 15+ students ranging in age from 5-11 & introduced a regimented routine/technical tennis skill
- Created workout plan with a focus on cultivating a passion for tennis through teaching the important skills of resiliency and hard work
- Communicated with students and parents in developing long-term goals and creating a Covid-19 pandemic friendly workout plan

LEADERSHIP & SPECIAL ACTIVITIES

Make A Play Foundation (MAP)

- Advanced Placement D-League Fellow (Team Friday Night Lights) | Remote 12/2022 – Present
 - Selected as 1 of 96 high-achieving sophomores to participate in a professional development fellowship for minority athletes
 - Lead weekly all-hands meetings & manage a portfolio of complex initiatives required to consult multiple Fortune 500 companies
- Training Camp Summer Scholar (Red Team) | Remote 06/2022 – 08/2022
 - Received 35 hours of targeted interview prep., professional development coaching & industry-specific training for F500 roles
 - Collaborated with a 6-person scrum team to consult Credit Suisse and Morgan Stanley on financial wellness + HBCU initiatives
 - Placed 3rd Overall in Morgan Stanley's Firmwide Strategy case competition, introducing a multi-channel financial wellness plan

Harvard University Varsity Tennis – NCAA Division I Student-Athlete | Cambridge, MA

08/2021 – Present

- Devote 25+ hours a week to: practice/training, film sessions, individual and team meetings, games, tutoring, travel, and community service

ANGELICA SIH

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EDUCATION

Cornell University, SC Johnson College of Business **Ithaca, New York**
THE CHARLES H. DYSON SCHOOL OF APPLIED ECONOMICS AND MANAGEMENT *Anticipated Graduation: May 2024*
Candidate for Bachelor of Science in Applied Economics and Management **GPA: 3.95**
Coursework: Microeconomics, International Trade & Finance, Statistics, Financial Accounting

RELEVANT EXPERIENCE

BANK OF AMERICA, MERRILL LYNCH **New York, NY**
Incoming Global Research Summer Analyst *Expected June 2022 - August 2022*

CORNELL UNIVERSITY DIVERSITY ON THE STREET **Ithaca, NY**
Active Member *September 2020 - Present*

- Discovered a new perspective on the financial services industry through an 8-week intensive education series
- Presented final stock pitch with 4 other team members for industry professionals to critique
- Arranged coffee chats with alumni and upperclassmen to learn more about different career paths in finance

DELOITTE UNDERGRADUATE CASE COMPETITION **Ithaca, NY**
Competition Participant *February 2021*

- Produced a five-year plan for the new merger company utilizing data from current industry leaders
- Analyzed company strengths and weaknesses to create synergies and cost savings for new merger company
- Pitched final merger ideas and five-year plan to Deloitte professionals to judge and critique

LEADERSHIP

STUDENT ATHLETE ADVISORY COMMITTEE, CORNELL UNIVERSITY **Ithaca, NY**
Women's Swimming & Diving Representative *February 2021 - Present*

- Discussed decisions made by Ivy League and athletic directors in response to COVID-19 pandemic
- Engaged in conversations regarding the improvement of the student-athlete experience on campus

ASIAN STUDENTS IN ACTION **Studio City, CA**
Co-leader *September 2018 - May 2020*

- Directed discussions regarding racism against Asian-American students both within my school and in L.A
- Organized weekly meetings, publicity events, and club outings with co-leaders to promote Asian culture
- Raised awareness of life as an Asian-American student in a predominantly white community

STUDENT ATHLETE ADVISORY COMMITTEE, HARVARD-WESTLAKE SCHOOL **Studio City, CA**
Women's Swimming & Diving Representative *September 2018 - May 2020*

- Led discussions and meetings with athletic directors to improve the high school experience for student athletes on campus
- Planned pep rallies and assemblies to involve more students in athletics and saw a 50% increase in spectators

ACTIVITIES

CORNELL UNIVERSITY VARSITY WOMEN'S SWIMMING AND DIVING TEAM **Ithaca, NY**
Division I *September 2020 - Present*

- Participated in team bonding activities to improve communication, teamwork skills, and build stronger relationships
- Devoted 20+ hours per week to athletics and demonstrated the ability to manage time by also carrying a full course load
- Competed against athletes from the Ivy League and other conferences; 2022 Ivy Championship Team Member

MAKE A PLAY FOUNDATION **Virtual Program**
D-League Fellow *March 2022 - Present*

- Selected as one of 150 varsity athletes across the nation to participate in a year long professional development program

OTHER CAMPUS INVOLVEMENTS

- Women of Color in Athletics, Big Red Leadership Institution, Society of Women in Business

SKILLS & INTERESTS

Skills: Chinese (conversational), Spanish (conversational), Microsoft Excel (proficient)

Interests: Finance, Consulting, Swimming, Music, Guitar, Traveling, Food

ANGELLE DIAMOND

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EDUCATION

Villanova University – Villanova, PA

GPA: 3.6/4.0

B.B.A. in Marketing and Finance

Anticipated Graduation: May 2024

- **Accomplishments:** NCAA Division I Student-Athlete (Villanova Volleyball Team); Dean's List (Fall, 2021; Harold T. Curran Scholarship
- **Industry Education:** Case Interview Prep 101, Creating Business Presentations, Intro. to MECE Part I & II, Intro. to the Pyramid Principle

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design business presentations for Fortune 500 companies
- **HubSpot Inbound Marketing:** used Inbound Marketing tools to create a market entry strategy for a top CPG co.
- **IC Agile Training:** used agile fundamentals to lead a scrum team of ~10 using the cloud service, Air Table
- **Lean Six Sigma Training:** used lean six sigma's DMAIC framework to improve Heineken's performance in the U.S.
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in sprints to coordinate project activities and track goals, milestones, and OKRs

EXPERIENCE

The Kraft Heinz Company – *Incoming Growth & Operations Student Consultant* | Remote

08/2022 – 10/2022

- Created a brand renovation strategy for Kraft's Capri-Sun fruit drink to help achieve 85% compliance with Global Nutrition Targets by '25
- Redesigned the Capri-Sun "pouch" to attract new buyer demographics that were historically under indexed & prefer healthier food options
- Analyzed stakeholder/materiality engagement to measure ESG goals and introduce a Capri-Sun product that achieves 50% sugar reduction
- Provided a long-term financial algorithm to help Kraft achieve adjusted EBITDA growth of 2% – 3% & adjusted EPS growth of 4% – 6%

Major League Soccer (MLS) – *MLS Next Pro Innovation & Growth Student Consultant* | Remote

05/2022 – 07/2022

- Created a 5-year strategic roadmap to help MLS's lower division professional soccer league, "Next Pro" achieve 27% rise in interest by '26
- Analyzed the growth of professional soccer in the US & designed a plan to increase its geographical/commercial reach by 32% in 3-5 years
- Rebranded the league name/logo to drive the league's expansion strategy efforts and help achieve a 10%+ sales lift by "Next Pro" sponsors
- Outlined the long-term vision required to achieve the strategy by establishing S.M.A.R.T. goals to provide clarity for each year of the plan

Heineken USA – *Strategy & Insights Student Analyst* | Remote

03/2022 – 05/2022

- Created a go-to-market strategy for Heineken USA that outlined the clear action plans and steps needed to succeed in the U.S. marketplace
- Developed a strategic implementation roadmap to visualize the key outcomes needed to achieve 15% beer volume growth by the end of '23
- Led benchmark analysis to compare Heineken's performance in the U.S. to other F&B companies with significant market share in the U.S.
- Established a focused cost-reduction program to meet Heineken USA's budget, lower the overall cost-base & solve profitability challenges

LEADERSHIP & SPECIAL ACTIVITIES

Deloitte US – MAP Entrepreneurial Leaders Participant

06/2022 – Present

- Shadow current Deloitte consultants to learn more about the consulting industry, individual roles & best practices for summer recruiting
- Develop business acumen through exposure to firm-wide functions including Customer & Marketing, Strategy & Human Capital Mgmt.
- Meet with a Deloitte mentor twice a month to learn more about how Deloitte uses technology & creativity to elevate the human experience

Make A Play Foundation (MAP) – D-League Fellow (Team Super Max); Consulting Track

03/2022 – Present

- Selected out of 400+ applicants to work on a case team with five other student-athletes, owning a distinct aspect of a project each month
- Manage a portfolio of complex initiatives with a scrum team of ~10 to consult 5 different minority-led startups within a calendar year
- Analyze business challenges through systematic problem-solving frameworks (ADKAR, DMAIC, MECE, MEDDIC, PESTEL, SWOT)

JP Morgan Chase & Co. – MAP Early Education Series Participant

03/2022 – Present

- Meet with different members of JPMC's Commercial Banking team once a month to learn more about Commercial and Corporate Banking
- Develop business acumen through exposure to firm-wide functions including Commercial Real Estate, Midsized Businesses, and Startups
- Learn how the firm manages relationships across the firm/globally in accordance with Corporations, Financial Institutions & Public Sector

Villanova University Volleyball Team – NCAA Division I Student-Athlete

08/2020 – Present

- Devote 25+ hours a week to: practice/training, film sessions, individual and team meetings, games, tutoring, travel, and community service
- Provide thoughtful leadership that is inclusive, transparent & empowering & supports the team's goal to develop teammates on/off the field
- Develop a results-oriented focus & skills in: communication, critical thinking, accountability, resiliency, teamwork, and time management

Oliver Wyman – MAP Consulting Summer League Participant

06/2022 – 08/2022

- Met with OW's "EMPOWERED" ERG to receive technical training for case interviews, written case interviews & behavioral interviews
- Developed business acumen through exposure to firm-wide functions including Business Services, Industrial Products, Private Capital, etc.
- Learned about OW's history and culture and the range of different projects the firm undertakes (i.e., automotive, energy, healthcare, travel)

JP Morgan Chase & Co. – GAME CHANGER: Student-Athlete Corporate Readiness Program Participant

05/2022 – 05/2022

- Connected with JPMC employees to learn more about the bank's firm, culture, DEI efforts & environment in which they conduct business
- Heard from senior leaders and recruiters across multiple business lines on how to transition from the athletic field to a corporate setting
- Introduced to the following LOBs: Asset/Wealth Management, Commercial Banking, Corporate & Investment Banking, Technology, etc.

Arctos Sports Partners – MAP Careers in Private Equity Participant

05/2022 – 05/2022

- Participated in a simulation that demonstrated how to make direct investments in private cos. or conduct private buyouts for public cos.
- Evaluated Blackstone Group LBO of Hilton (2007) in a \$26B take-private deal at 32% premium to its public stock price (entry thru. exit)
- Analyzed Sequoia's Big Bet on WhatsApp as the sole investor, leading the \$8M Series A funding round in '11 & \$52B in Series B in '13

ANISHA KUNDU

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EDUCATION

Boston College | Carroll School of Management – Chestnut Hill, MA

GPA: 3.85/4.0

B.S. in Management (Concentration in Finance) | Minor in Environmental Studies

Anticipated Graduation: May 2025

- **Accomplishments:** NCAA Division I Student-Athlete (Boston College Fencing); Gabelli Presidential Scholar (Full Tuition Merit Scholar); 3rd Place in '22 Bank of America Case Competition; USA Fencing All-American First Team; USA Fencing All-Academic First Team
- **Relevant Courses:** Business Ethics, Business Law, Coding for Business, Excel for Analytics, Financial Accounting
- **Industry Education:** Building a Financial Model, Core Data Analysis, Core Financial Concepts, Finance Interview Prep, Valuation 1: DCF

Gabelli Presidential Scholars Program – Chestnut Hill, MA

GPSP Class of 2025

Anticipated Graduation: May 2025

- **Description:** Selected as 1 of 23 students out of 12,000+ applicants in the class of 2025 to receive the only merit-based, full-tuition scholarship program (4 years) offered by Boston College—sponsored by the Wall Street Council at BC

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design business presentations for Fortune 500 companies
- **Agile Development:** managed a team of 5 as scrum master, introducing short-term deliverables to improve the project
- **Coding Languages:** experience using R, Python, HTML & CSS to complete multiple academic/independent projects
- **Performance Management:** ensured scrum team's outputs & daily activities met BofA's goals to launch new program
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in sprints to coordinate project activities and track goals, milestones, and OKRs

EXPERIENCE

Girls Who Invest Summer Intensive Program – *Incoming GWI Scholar & Intern* | New York, NY

06/2023 – 08/2023

- Expected to complete a paid internship with leading investors at a top investment firm across the U.S., U.K. & Canada (placement pending)
- Expected to learn core finance/investment concepts from business professors & apply new valuation skills during group capstone project

United Health Group – *MAP Corporate Strategy Student Consultant; Development Team Member (Monitor Phase)* | Remote

12/2022 – 02/2023

- Designed a national “doula program” for UHG to positively impact 10k+ BIPOC mothers for Black Maternal Health Week between '23-26
- Owned the ‘monitor phase,’ managing a \$1.5M budget & allocating funds for direct (5+ quality creative assets) & indirect costs (advocacy)
- Provided a financial algorithm to make the plan profitable & help UHG achieve a 25%+ EBITDA increase year-over-year between '23-26
- Led benchmark analysis to compare spend rationalization against 3 UHG partners:
 - **Afr. Am. Babies Coalition:** audited a \$150K grant by UHG to address racial health disparities in Minneapolis - St. Paul in '22
 - **March of Dimes:** audited a \$2.85M grant by UHG to fund quality improvement work in hospitals with maternal morbidity in '21
 - **Sistas Caring 4 Sistas:** audited a \$25K grant by UHG to fight negative outcomes for pregnant women in North Carolina in '22

Bank of America – *Strategy & Management Student Consultant; Scrum Master* | Remote

09/2022 – 11/2022

- Created a new skill-based campus wellness program to reduce mental health disparities for BIPOC students on college campuses by 25%+
- Oversaw the scrum/development team, ensuring all 5 members executed the plan to drive/enhance BofA's firmwide mental health strategy
- Led weekly all-hands meetings to advise scrum implementations, including Lean Six Sigma strategy, HubSpot flywheel & ADKAR model
- Submitted a project closure report/scrums guide (including 12-slide PowerPoint) to BofA's Credit team to formally close the project/phases

Women's Lunch Place (WLP) – *Direct Care and Resource Center Intern* | Boston, MA

06/2022 – 08/2022

- Researched job opportunities for WLP (a day shelter for homeless women) and assisted 20+ women per day with financial literacy, including taxes, general budgeting, and computers skills in the resource center

TurnUp | Youth Activism Platform – *General Director* | Remote

06/2020 – 08/2021

- Supervised 60+ members & 14 national teams to online canvassing focusing on increasing millennial voting rates

Innovation Labs at Verizon Wireless – *Student Intern* | Waltham, MA

01/2020 – 03/2020

- Conducted market research, competitive analysis, and product testing for next-generation location services using VR
- Presented research on 5G millimeter waves and conducted various SWOT analyses to project management team

LEADERSHIP & SPECIAL ACTIVITIES

Make A Play Foundation (MAP) – *D-League Fellow '23; Team Captain* | Remote

09/2022 – Present

- Lead weekly all-hands meetings & manage a portfolio of complex initiatives required to consult 2 Fortune 500 companies with a case team

WZBC 90.3 Newton – *FM Show Radio Host of Unlucky Pupil* | Chestnut Hill, MA

09/2022 – Present

- Run a weekly segment consisting of financial news for public access and Spanish psychedelic rock music

McMullen Museum of Art at BC – *Student Ambassador* | Chestnut Hill, MA

09/2021 – Present

- Engage with visitors by addressing questions and giving tours of the exhibitions including art from Cuba and Ireland

RBC Capital – *Women's Advisory Program Participant* | New York, NY

10/2022 – 11/2022

- Selected to an early insight/professional development program for outstanding female sophomores to explore Capital Markets careers
- Met with an RBC mentor in preferred business area to foster a deeper learning of the Global Banking and Global Markets industries

ANNORA Y. LEE

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EDUCATION

Harvard College – Cambridge, MA

GPA: 3.7/4.0

B.A. in Linguistics & Music | SAT: 1540

Anticipated Graduation: May 2024

- Accomplishments: NCAA DI Student Athlete – Fencing
- Relevant Courses: Economics 50, Accounting, Introduction to Calculus, Statistics for the Social Sciences, Introduction to Linguistics
- Industry Education by Summer '23: 5 Phases of Project Management; Creating Business Presentations 101; Scrum Methodology

EXPERIENCE

Deloitte – Risk, Compliance & Advisory Student Consultant | Remote

07/2023 – 08/2023

- Created a color-coded risk assessment matrix to define the varying risk levels associated with introducing a business transformation strategy to the WNBA, consolidating risks into one chart to represent the impact, likelihood of occurring & actionable mitigation strategies
- Developed a change management strategy to emphasize the need for Deloitte to implement my scrum team's multi-year strategy by raising (1) awareness; (2) desire; (3) knowledge; (4) ability and (5) reinforcement with the team overseeing the WNBA Changemaker partnership
- Implemented Lean Six Sigma's "DMAIC" framework to "control" the project by actively reviewing the status of the strategy for MLS, evaluating potential obstacles/implementing necessary changes required to submit the project to Deloitte leaders against a 5-week deadline
- Updated and actively monitored the team's project management workflow on Air Table, "owning" the monitoring phase of the project, streamlining the process of achieving goals by completing all deliverables 2 weeks ahead of schedule (i.e., change management strategy)

Harvard College Admission & Financial Aid Office – Tour Guide | Cambridge, MA

09/2021 – Present

- Effectively articulated key highlights of Harvard College to visitors, combining personal anecdotes and factual information to provide a comprehensive understanding of the student experience
- Facilitated weekly Zoom information sessions for international students and families in different time zones, conducting real-time Q&A to ensure efficient and comprehensive information delivery
- Demonstrated proactive communication skills by conveying challenges and inefficiencies experienced during tours and information sessions to superiors, utilizing these instances as opportunities for learning, developing strategies, and enhancing interpersonal skills

Zara – Retail Sales Associate | Cambridge, MA

06/2021 – 08/2021

- Assembled and maintained a minimum of 10 displays per week on two separate floors, ensuring the presentation of the latest products from new collections to engage potential customers
- Actively recommended tailored product selections to multiple customers, adeptly understanding their preferences and requirements, thereby enhancing my interpersonal skills through interactions with diverse backgrounds and goals
- Meticulously handled all merchandise prior to store opening, including unpacking and folding items from warehouse deliveries, while maintaining accurate inventory records for effective tracking.

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – D-League Fellow '23 (Summer Cohort) | Remote

06/2023 – Present

- Selected as 1 of 100 college athletes to participate in a fellowship designed to prepare underrepresented athletes for professional success
- Received 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
- Collaborated with a 6-person scrum team to develop a multi-year strategy for Deloitte's WNBA initiative against a 5-week project deadline
 - Technical Skills Acquired: Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development

Harvard College Varsity Fencing – Student Athlete | Cambridge, MA

08/2020 – Present

- Identified and resolved communication issues within the team, resulting in improved efficiency in distributing tournament schedules and providing clearer instructions on travel days
- Supervised a group of 3-4 prospective recruits throughout the season, all of whom subsequently committed to Harvard, showcasing effective leadership and recruitment skills
- Led film study sessions for 5 athletes, enhancing their performance and contributing to a notable second-place victory at the Ivy League Championships in 2022

Undergraduate Women of Harvard Athletics – General Board Member | Cambridge, MA

09/2021 – 05/2022

- Organized and led three events for female athlete alumni from Harvard, comprising networking sessions to advance professional careers, a resume and LinkedIn workshop for effective self-marketing, and an annual senior sendoff brunch
- Developed a specialized database encompassing personal information, athletic accomplishments, and professional careers of female athlete alumni, conducting extensive research to identify former athletes associated with Harvard
- Corresponded with Harvard's female athlete alumni, inviting their participation in an organization-led speaker series, enabling current undergraduates to gain insights into the alumni's experiences as athletes and women

Harvard College Opera – Alumni Chair | Cambridge, MA

09/2022 – 05/2023

- Centralized a comprehensive database for Harvard College Opera, consolidating personal and professional information of alumni from various years, facilitating networking opportunities within the organization's art community
- Hosted a successful alumni night, uniting Harvard College Opera alums and current members, bridging generations of music enthusiasts; collaborated with multiple vendors to procure event supplies, oversaw venue setup, and ensured seamless operations.
- Played a key role in the coordination of the annual Harvard College Opera Gala, facilitating communication with vendors and contributing to the interior design setup of the venue, working closely with the food and beverage team

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Seattle Seahawks, opera, science fiction movies, playing piano (I am a classically trained pianist!)

AUDREY M. CHU

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EDUCATION

Columbia University – New York, NY **GPA: 4.0/4.0**
B.S. in Mathematics & Economics | ACT: 35 Anticipated Graduation: May 2025

- **Accomplishments:** NCAA Division I Student-Athlete (Columbia Women's Fencing); Three-Time USA Fencing First Team All-American
- **Relevant Courses:** Calculus-Based Statistics, Intermediate Macro/Microeconomics, Linear Algebra, Ordinary Differential Equations
- **Industry Education:** Case Interview Prep 101, Creating Business Presentations, Intro. to Finance 101, MECE Part I & II, Pyramid Principle
- **Leadership Events:** Participated in Leadership Events with Bank of America, Deloitte, Evercore, Oliver Wyman & JP Morgan Chase & Co.

EXPERIENCE

Bank of China – *Incoming Summer Analyst* | Hong Kong, CN **06/2023 – 08/2023**

- Expected to gain exposure to real-life projects in a fast-paced environment while building financial acumen & gaining banking knowledge

Consult Your Community – *Consultant* | New York, NY **09/2022 – Present**

- Assess Oren's Daily Roasters' competitiveness and helped introduce two new lines of product
- Advise multiple local businesses in Morningside Heights to increase corporate competitiveness
- Led a team after sourcing a partnership with Cafe East, a promising small university cafe on Columbia campus

DICK'S Sporting Goods – *Strategy Student Consultant* | Remote **01/2023 – 03/2023**

- Designed a national marketing campaign to promote DSG's products to 100K+ new female customers for Women's History Month in 2023
- Owned the 'planning phase,' implementing Lewin's 3-Stage model to effectively plan the execution and implementation of the campaign
- Analyzed 3 factors to help DSG achieve 8% increase in Q1 net sales within 3 months of launch by highlighting BIPOC female athletes
 - **Unfreeze:** applied a current state analysis, analyzing previous campaigns to identify growth opportunities for new strategy
 - **Change:** created a 3-year roadmap to visualize the benefits of introducing a female-focused strategy with ethnically diverse leads
 - **Refreeze:** developed an operating manual to anchor the desired changes into DSG's organizational culture & solidify new 'state'

Forte Capital Group – *Intern* | New York, NY **09/2022 – 12/2022**

- Monitored and analyzed client portfolios and investment objectives, generating 30+ leads for the firm
- Briefed existing and prospective clients, attending weekly firm meetings, and performing stock pitches
- Conducted market research through analysis of business trends, real estate markets, sector analysis, and securities analysis

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – Women's Playmaker '23 (Team Ora Washington) | Remote **01/2023 – Present**

- Selected as 1 of only 120 college women athletes to participate in a two-month fellowship to prepare for careers in competitive industries
- Analyze business challenges through systematic problem-solving frameworks (ADKAR, DMAIC, MECE, MEDDIC, PESTEL, SWOT)
- Collaborated with a scrum team of 5 to develop a multi-year strategy for DSG's Women's History Month initiative with a 5-week timeline
 - Technical Skills Acquired: Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development

Parkinson's Pals – Founder | New York, NY **05/2022 – Present**

- Cofounded Columbia chapter to facilitate intergenerational connections between Parkinson's patients and students
- Designed club logo, created social media campaign and weekly educational content. Increased club presence by 200% on Instagram
- Campaigned for Parkinson's Pals by attending physicians' meetings and contacting doctors in the local community for patient referrals

Columbia Undergraduate Recruitment Committee – Recruitment Committee Member | New York, NY **10/2021 – 09/2022**

- Conducted more than 30 weekly tours to share Columbia undergraduate experience with prospective students
- Appointed to direct social media and operated Columbia Admissions social media to show life as a student-athlete
- Led student activities during Lions Week and increased prospective students' retention rate

Apostle Diagnostics – Research Assistant | San Jose, CA **06/2020 – 09/2020**

- Assigned as research assistant and produced more than 6000 covid testing solution kits
- Managed to increase production efficiency by 20% through experimental design and quality control
- Ensured stocks of the lab by creating an inventory track sheet used by the entire company

Academy of Fencing Masters – Head Referee | Sunnyvale, CA **03/2018 – 02/2020**

- Assigned 10 referees to their corresponding strips during monthly regional fencing competitions
- Supervised young fencers to become volunteer referees through 3-hour long training sessions
- Coordinated with local food trucks during competition days for partnerships

NON-TECHNICAL SKILLS & INTERESTS

- **Fun Fact:** I raise budgerigars!
- **Interests:** Ballet, Piano, Pet Budgerigar, K-Dramas, Yoga, League of Legends, Interior Design, Mahjong.
- **Biggest Sports Lesson:** The smallest things make the biggest differences.

AVI S. AGARWAL

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EDUCATION

Princeton University – Princeton, NJ **GPA: 3.75/4.0**
B.A. in Economics | Minor in Finance, Statistics and Machine Learning | SAT: 1560 Anticipated Graduation: May 2026

- **Accomplishments:** CSA Division I Student-Athlete (Princeton Squash); UBS Tomorrow's Talent Participant
- **Relevant Courses:** Financial Accounting, Statistics and Data Analysis for Economics, Macroeconomic Theory, Multivariable Calculus for Economics/Life Sciences, Introduction to Microeconomics
- **Wall Street Prep Education by 2024:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

EXPERIENCE

Warburg Pincus – *Investment Banking Student Analyst; Scrum Master* | New York, NY (Remote) **January 2024 – Present**

- Advised Warburg on the potential acquisition of a new HVAC company, approving the design of a 3-Statement Model used to forecast my team's income statement, balance sheet & cash flow statement for up to 5 years, delivering a final presentation to the Human Capital Team
- Collaborated with a team of 6 pre-professionals to produce a comparable company analysis, DCF sense check & 5+ financial assumptions
- Approved and submitted a final 12-page pitchbook + single master document (CIM) outlining the materials produced by the project and how they have been organized to Warburg leadership, formally closing the project & transferring all materials/solutions to Erin Remedios

Morgan Stanley – *Fixed Income Student Analyst; Risk (Team Arthur George Gaston)* | Remote **April 2023 – June 2023**

- Selected to participate in an invite-only case competition with Morgan Stanley's Fixed Income Division, developing an investment thesis for MD, Stephen Dance, to recommend the best asset for a client to invest in through '23 (i.e., treasuries, equities, investment grade credit)
- Created a color-coded risk assessment matrix to define the varying risk levels associated with recommending a new asset class to a client, specifically considering downsides/headwinds in my 5-person scrum team's investment thesis & consolidating risks into a single chart
- Produced a profit target in Microsoft Excel to provide a clear idea of profit potential versus how much our team's client might potentially lose when investing in our asset, supplementing our spreadsheet with a 4-step mitigation strategy to avoid/reduce/transfer/accept all risks

Citizens' Climate Lobby – *Princeton Chapter Member* | Remote **May 2020 – September 2022**

- Supported a group of like-minded young members in Citizens' Climate Lobby and attended monthly meetings to learn about different initiatives and meet others in the organization
- Provided a youth perspective on climate change solutions and ultimately contributed to 10+ chapter meetings with Princeton residents over the course of 2 years and 5 additional conferences with members of Congress
- Coordinated several meetings with a smaller group within Citizens' Climate Lobby to prepare for and successfully organize a call with Senator Cory Booker's office promoting H.R. 763, a piece of climate legislation

New Jersey Squash Club – *Squash Coach* | Lawrenceville, NJ **November 2020 – December 2020**

- Facilitated fitness testing for 10+ players over the course of a month and a half which resulted in increased anaerobic fitness and sports knowledge for the majority of the involved players
- Coached and mentored 10+ players in group sessions which ultimately produced 3 players who are regular members of Team USA for international tournaments and achieved top 5 rankings nationally in their respective age groups

LEADERSHIP & COMMUNITY DEVELOPMENT

Princeton Squash Team – *CSA Division I Student-Athlete* | Princeton, NJ **September 2022 – Present**

- Demonstrate outstanding time management skills, balancing a rigorous academic schedule with intensive squash practices & competitions
- Serve as a leader of sportsmanship and teamwork by maintaining active communication with teammates and coaches through practices and competitions, contributing to the success of the team on and off the field

US Squash Men's Junior Squash Team – *Interim Captain* | Nancy, France **August 2022 – August 2022**

- Oversaw the US Men's Junior Squash Team at the World Junior Squash Championships in a match against France guiding the team to a victory and a 7th place finish in the world
- Handled morale problems preceding the 7-8th place match against France after 3 teammates had to return home, ultimately contributing to a positive team dynamic
- Coordinated travel logistics for the team in an unfamiliar city, allowing the team to focus on the match and avoiding unnecessary difficulties in reaching the match venue

Village Book Builders – *Mentor* | Remote **September 2020 – June 2022**

- Mentored a fourth-grade student in Kenya remotely for over 2 years in Mathematics and English, overcoming a language barrier to improve his academic abilities and foster social growth as he furthered his education.
- Implemented weekly lesson plans to both test the student's skill and help him grow, ultimately teaching him to read English by himself, hold basic conversation, and master the four basic math operations.
- Developed weekly conversation prompts with the student about various topics of interest which taught him about American culture, allowed him to describe his home in English, and improved his communication skills.

StreetSquash – *Princeton Team Captain & Participant* | Remote **May 2017 – October 2020**

- Planned a grassroots fundraising effort for the 12th StreetSquash Jr. Cup during the COVID-19 pandemic, raising over \$800 for underprivileged students and squash players in Newark, NJ.
- Promoted the StreetSquash Jr. Cup initiative as a Princeton Team Member, contributing to a team victory in 2018 and 2019 and over \$1700 dollars raised over the course of 3 years.

NON-TECHNICAL SKILLS & INTERESTS

- **Interests:** Dystopian Novels, Creative Writing, Movies, Learning New languages (I learned Hindi from watching old Indian movies).

BRIDGET S. O'KEEFE

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EDUCATION

The Wharton School of the University of Pennsylvania – Philadelphia, PA

Anticipated Graduation: May 2026 Candidate for Bachelor of Science in Economics; Concentration: Finance

Cumulative GPA: 3.6/4.0

- **Relevant Courses:** Accounting and Financial Reporting, Corporate Finance, Introductory Business Statistics, Introduction to Folklore
- **Accomplishments:** NCAA Division I Student-Athlete (Women's Golf); 2022-23 First Team All Ivy, 2022-23 WCGA All-American Scholar
- Clubs at Wharton: Wharton Women, Wharton Undergraduates in Public Policy, Wharton Undergraduates Sports Business Club

Palo Alto High School – Palo Alto, CA

June 2022

GPA (Unweighted) 3.8/4.0 SAT score: 1520

- **Honors/Awards:** National Merit Scholarship Program Finalist, AP Scholar with Distinction Award by College Board, AJGA Rolex Scholastic Junior All-America Award, 2019 CA State Girls Golf Champions

EXPERIENCE

J. Goldman & Co. L.P. | New York, NY

June 2024 – Present

- Assisting a Partner/Portfolio Manager and Analyst on the capital markets and private investments team
- Shadowing the entire IPO deal process from the buy-side perspective, from deal launch to trading
- Preparing a research presentation on Turo, inclusive of an S-1 deep dive, channel checks, and valuation work
- Attaining exposure to management teams via joining several conferences, NDR and TTW meetings
- Networking with both buy-side and sell-side equity capital markets professionals

Intelsat S.A. – Summer Intern, FP&A team | *McLean, VA*

June 2023 – August 2023

- Developed monthly forecast models, conducted in-depth analysis of revenue pipeline data
- Implemented Excel Visual Basic for Applications (VBA) programming language code into macro worksheets to consolidate data
- Analyzed financial statements, built and delivered a DCF model and presented findings to senior management

Project Destined – Intern, Chatham Financial | Remote

January 2023 – April 2023

- Analyzed a \$3.1 million multi-family property in Philadelphia by working with Chatham Financial mentors to project property's rent growth, cash flows and build sensitivity analysis
- Conducted research on the Philadelphia housing market with Co-Star, generated value-add ideas, and evaluated potential risks and mitigants
- Prepared and presented an investment memo to real estate professionals from Greystone, JLL, etc.

LEADERSHIP & SPECIAL ACTIVITIES

NCAA Division I Student-Athlete: Women's Golf | Philadelphia, PA

August 2022 – Present

- 25-30 hour per week commitment to practice and competitions
- Led the team in stroke average (75.1) in 2022-23 season, with three Top-5 and a Top-10 finish
- 2023 Ivy League Champions, with an individual third-place finish; team advanced to 2023 NCAA Regional in Florida

Girls Who Invest | Remote

January 2024 – Present

- Will develop foundational finance and investment concepts through CFA Institute, Wall Street Prep, Project Destined and Wharton Online program
- Expect to collaborate with other GWI scholars through community events and projects
- Aim to build relationships with alumni and partners in the investment industry through career development panels

Wharton Undergraduates Sports Business Club – Summit Planning Committee | Philadelphia, PA

January 2024 – Present

- In charge of planning the 2024 Wharton Undergraduate Sports Business Club Summit, an event that will feature a variety of sports industry leaders
- Coordinating a range of compelling panel themes and contacting potential speakers and local sponsors

Make A Play Foundation (MAP) | Remote

December 2022 – February 2023

- Women's Playmakers Summit (Team Junko Tabei)
 - Selected as one of only 120 college women athletes to participate in a six-week conference to explore competitive career paths
 - Received 10+ hours of targeted interview prep., professional development coaching & industry-specific training for F500 roles
 - Worked with a team of 5 to introduce a female-focused marketing campaign to DSG's sales team for Women's History Month

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design presentations for Fortune 500 companies
- **Agile Development:** managed a team of 6 as [team leader](#), introducing short-term deliverables to improve the project
- **Iterative Design:** submitted [PDSA](#) document after building new Dick's Sporting Goods plan to help identify potential issues with process
- **Performance Management:** ensured scrum team's outputs & daily activities met DSG's goals to launch new program
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in [sprints](#) to coordinate project activities and track goals, milestones, and OKR

NON-TECHNICAL SKILLS & INTERESTS

- **Fun Fact:** Fluent in French
- **Interests:** Violin, Sports enthusiast (49ers, Golden State Warriors, Rory McIlroy favorite golfer), investor in Arcadia Tractor Corporation, Second Harvest Food Bank volunteer

CAMERON J. NASH

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EDUCATION

Georgetown University – Washington, DC

B.A in Finance

Anticipated Graduation: May 2025

- **Accomplishments:** NCAA Division I Student-Athlete (Georgetown University Football); MAP Training Camp Scholar '22
- **Relevant Courses:** Cadet Basic Training, Calculus II, Computing Fundamentals, Financial Accounting, Systems Engineering
- **Industry Education:** Case Interview Prep 101, Creating Business Presentations, Intro. to Finance 101, MECE Part I & II, Pyramid Principle

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design business presentations for Fortune 500 companies
- **HubSpot Inbound Marketing:** used Inbound Marketing tools to create a DEI roadmap for a bulge bracket bank
- **IC Agile Training:** used agile fundamentals to lead a scrum team of ~10 using the cloud service, Air Table
- **Lean Six Sigma Training:** used lean six sigma's DMAIC framework to improve employee relations for a top bank
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in sprints to coordinate project activities and track goals, milestones, and OKRs

EXPERIENCE

Morgan Stanley – Firmwide Strategy Student Consultant | Remote

07/2022 – 08/2022

- Created a multi-channel financial wellness program for MS's Strategy & Operations team to enhance employee relationships post-COVID
- Introduced several initiatives (i.e., digital financial portal) to assess & address the financial concerns of Black/Hispanic workers at the bank
- Developed a 3-year action plan to reduce the % of Black/Hispanic workers worried about their financial futures from 61% to <50% by '25
- Presented results to MS's Strategy & Ops. team leveraging Pyramid & MECE principles to subdivide PowerPoint slides into small subsets

Credit Suisse – HBCU Recruiting Student Consultant | Remote

06/2022 – 07/2022

- Created a 3-year redesign strategy/roadmap to increase the % of HBCU applicants to summer internships and entry-level roles at the bank
- Analyzed CS's "Scholars Program" through McKinsey's 7S model to assess the bank's progress to improve the profile of HBCU diversity
- Outlined the long-term vision needed to achieve the strategy by establishing S.M.A.R.T. goals to provide clarity for each year of the plan
- Presented results to CS's campus recruiting team leveraging Pyramid & MECE principles to subdivide PowerPoint slides into small subsets

LEADERSHIP & SPECIAL ACTIVITIES

JP Morgan Chase & Co. – MAP Early Education Series Participant

06/2022 – Present

- Meet with different members of JPMC's Commercial Banking team once a month to learn more about Commercial and Corporate Banking
- Develop business acumen through exposure to firm-wide functions including Commercial Real Estate, Mid-sized Businesses, and Startups
- Learn how the firm manages relationships across the firm/globally in accordance with Corporations, Financial Institutions & Public Sector

Oliver Wyman – Introduction to Consulting 101 Participant

06/2022 – 08/2022

- Met with OW's "EMPOWERED" ERG to receive technical training for case interviews, written case interviews & behavioral interviews
- Developed business acumen through exposure to firm-wide functions including Business Services, Industrial Products, Private Capital, etc.
- Learned about OW's history and culture and the range of different projects the firm undertakes (i.e., automotive, energy, healthcare, travel)

Bank of America – MAP Summer League Participant

06/2022 – 08/2022

- Met with BofA's "D.E.A.L." ERG to receive technical training in "banking" (i.e., company valuation, financial statement modeling, M&A)
- Met with BofA's "D.E.A.L." ERG to receive technical training in "markets" (i.e., stocks vs bonds, drivers of markets, economic principles)
- Developed business acumen through exposure to firm-wide functions including Banking, Corporate Functions, and Global Capital Markets

Credit Suisse | Morgan Stanley – MAP Rising Stars Tournament Participant

06/2022 – 08/2022

- Participated in a semester-long summer course with CS/MS where scholars learned key financial concepts & their real-world applications
- Competed in a case competition with a team of six—tasked with creating a financial wellness program to enhance employee relationships
- Shadowed current professionals across multiple LOBs to learn more about careers in consulting, finance, operations, law, and technology

Make A Play Foundation (MAP) – Training Camp Summer Scholar (Blue Team); Consulting Track

06/2022 – 08/2022

- Selected as one of 90 student-athletes to participate in a ten-week professional development course for underrepresented rising sophomores
- Received 35 hours of targeted interview preparation, professional development coaching & industry-specific training for Fortune 500 roles
- Participated in various events with MAP's Fortune 500 partners to explore potential career paths in consulting, finance, operations & tech

Credit Suisse – Finance Open House Participant

06/2022 – 06/2022

- Met with current CS employees who shared their personal experiences & discussed various career paths available at the bank & in finance
- Heard from senior leaders and recruiters across multiple business lines on how to transition from the athletic field to a corporate setting
- Introduced to the following LOBs: Asset/Wealth Management, Commercial Banking, Corporate & Investment Banking, and Technology

Moody's – Introduction to Finance 101 Participant

06/2022 – 06/2022

- Met with current professionals and former student-athletes at Moody's to learn about bond credit rating and non-rating activities at the firm
- Received a comprehensive overview of different LOBs from the Strategy & Planning team (i.e., Analytics, Investors Service, Philanthropy)
- Learned extensively about Moody's DEI strategy and its commitment to hiring diverse candidates & promoting non-traditional employees

NON-TECHNICAL SKILLS & INTERESTS

- **Fun Fact:** I was able to co-pilot an airplane in the 6th grade
- **Interests:** Management Consulting, Finance, and Sales

CHASON C. BARBER

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EDUCATION

Brown University – Providence, RI

GPA: 3.5/4.0

B.A. in Business Economics | ACT: 31

Anticipated Graduation: May 2026

- Accomplishments: NCAA Division 1 Student-Athlete (Brown U. Football); MAP x Morgan Stanley First-Year Scholar '23
- Relevant Courses: Intermediate Micro/Macroeconomics, Essential Math for Economics, Engineering 0090, Financial Accounting
- Wall Street Prep Education by 2024: Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

EXPERIENCE

Morgan Stanley – *Student Analyst; Scrum Master (Team Carla Harris)* | Remote

04/2023 – 06/2023

- Selected to participate in an invite-only case competition with Morgan Stanley's Fixed Income Division, developing an investment thesis for a hypothetical client that recommended the best asset class to invest in through the end of 2023 (i.e., equities, investment grade bonds)
- Developed a 2-page written project charter with S.M.A.R.T. goals + a schedule of tasks and milestones for each sprint of the project (5), serving as an ongoing guide to help my scrum team of 5 remain on task against a 5-week deadline for Managing Director, Stephen Dance
- Led weekly sprint reviews, implementing Tuckman's 5 Stages of Group Development (forming/storming/norming/performing/adjourning) to provide structure during meetings, resulting in the team completing 50% of tasks early & collaborating throughout the entire project
- Approved and submitted a final 12-page slide deck + a single master document outlining the materials produced by the project and how they have been organized to MS's leadership team, formally closing the project & transferring all materials/solutions to MS's D&I Advisor

Innis Arden Golf Club – *Hospitality and Catering Associate* | City, State

06/2022 – 08/2022

- Coordinated and set up events and parties at the country club and also served as a host to guests, hosting 10+ events over the summer
- Managed the inventory of the snack bar during my shifts, rarely running out of an item during shifts as whenever something in the inventory was low, I would order it as soon as possible
- Greeted club members at the door when hosting events and I also waited tables, forming strong connections with the club members

LEADERSHIP & COMMUNITY DEVELOPMENT

Warburg Pincus – MAP Elite 100 Investment Fellow | Remote

09/2023 – Present

- Selected as 1 of 100 second-year athletes to participate in a five-part fellowship designed to prepare BIPOC students for careers in banking
- Receive 20+ hours of virtual instruction in accounting, technical interview preparation & industry-specific training for future banking roles
- Collaborate with 5 athletes + 1 IB head coach to prepare a final buy/sell/hold recommendation & price target to Warburg's leadership team

Make A Play Foundation (MAP) – Morgan Stanley 'Skills Challenge' Mentee | Remote

04/2023 – 06/2023

- Selected as 1 of 150 first-year athletes to participate in an eight-week fellowship designed to hone technical skills for a career in finance
- Received 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for finance roles
- Collaborated with a 4-person scrum team & Morgan Stanley mentor to deliver an investment thesis to the bank's Fixed Income Division

Brown University Varsity Football – NCAA Division I Student-Athlete | Providence, RI

09/2022 – Present

- Devote 25+ hours a week to: practice/training, film sessions, individual and team meetings, games, tutoring, travel, and community service
- Provide thoughtful leadership that is inclusive, transparent & empowering & support the team's goal to develop teammates on/off the court
- Develop a results-oriented focus & skills in: communication, critical thinking, accountability, resiliency, teamwork, and time management

Greenwich High School – Basketball Team Captain | Greenwich, CT

12/2021 – 03/2022

- Addressed the team before and after every practice with a short speech, ensuring everyone was on the same page for what my expectations were for practice, games, and off the court
- Fostered a new culture in our struggling basketball program with a new coach, building a foundation for our program to succeed, which resulted in the team making it to the state and conference playoffs for the first time in 10 years
- Mentored younger players on the varsity roster to improve their skills, resulting in several younger players getting playing time, and demonstrating significant improvement from the beginning of the season to the end

Boys and Girls Club of Greenwich – Volunteer Camp Counselor | Greenwich, CT

06/2019 – 08/2020

- Supervised a group of 15 campers who attended the Boys and Girls Club summer camp, building strong relationships I maintain currently
- Motivated campers who were sitting out to participate in activities; while it is common for young kids to be stubborn about participating in activities they don't like, it was my job to make sure my group's campers all had a fun, active day at camp
- Coordinated basketball games between our groups, helping different groups interact with each other and learn the value of teamwork

Old Greenwich-Riverside Community Center – Flag Football Coach | Greenwich, CT

03/2020 - 06/2020

- Led practices and coached my players during games, creating a fun and supportive environment; hard work allowed us to make it to the championship game that season with everybody getting equal amounts of playing time
- Communicated with the players parents to organize practice and game times; maintaining a regular cadence communication (i.e., through text message, email & phone conversations) with parents ensured that nobody missed games unless they could not make it
- Taught younger athletes how to properly play football, harnessing their willingness and eagerness to learn & improve throughout the year

Greenwich Youth Conservation – Manual Labor | Greenwich, CT

06/2018 – 07/2018

- Repaired trails around the parks in our community by clearing out overgrown weeds and vines throughout various locations, helping create walking paths for people to use in places where it was previously unwalkable
- Transformed areas by planting trees around public places—the trees that I planted have grown by now and to this day I can go and see them at the parks where they were planted years ago
- Improved the quality of our beaches by administering beach cleanups, which proved to be a necessity that most people often overlook

NON-TECHNICAL SKILLS & INTERESTS

- Interests: I like to play golf!

CHRISTIANA A. NWACHUKU

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EDUCATION

University of Pennsylvania – Philadelphia, PA

B.A. in Finance | Minor in Data Science | SAT: 1450

GPA: 3.1/4.0

Anticipated Graduation: May 2026

- Accomplishments: NCAA Division 1 Student-Athlete (UPenn Women's Track & Field)
- Relevant Courses: Accounting and Financial Reporting, Corporate Finance, Introductory Business Statistics, Introductory Economics for Business Students, Introduction To Management
- Industry Education by Summer '23: Building a Financial Model, Core Data Analysis, Core Financial Concepts, Finance Interview Prep

EXPERIENCE

Morgan Stanley – Student Analyst; Investments (Team Clifton Wharton, Jr.) | Remote

04/2023 – 06/2023

- Selected to participate in an invite-only case competition with Morgan Stanley's Fixed Income Division, developing an investment thesis for Managing Director, Stephen Dance, to recommend an asset (US Treasuries) to one of Morgan Stanley's clients through the end of 2023
- Transformed my team's recommendation report into a principled investment strategy, creating a checklist of 5+ "yes or no questions" to provide MS with a holistic view of our asset & each of its moving parts, also serving as a summary of our personal investment process
- Produced a 2-page written investment thesis outlining why our asset would generate an attractive return for MS, analyzing 4 steps: (1) underlying catalyst(s); (2) position within catalyst(s); (3) risk/reward profile; and (4) expected return(s) & conviction level (low/mid/high)
- Updated and actively monitored the team's project management workflow on Air Table, "owning" the execution phase of the project, streamlining the process of achieving goals by completing all deliverables 4 weeks ahead of schedule (analysis, recommendation report)

Springview Pharmacy – Pharmaceutical Assistant Intern | Irvington, NJ

06/2021 – 08/2022

- Administered over 1,000 COVID-19 vaccination cards for patients at vaccine clinics during the pandemic
- Trained newly hired employees on restocking, cashiering, and cleaning
- Provided stellar customer service to over 50 clients a day to ensure proper prescription is obtained

Camp Dudley at Kiniya – Junior Leader | Colchester, VT

07/2016 – 08/2022

- Provided mentorship to 11 junior campers during challenging activities such as swimming and hiking
- Offered assistance and guidance to 2 co-leaders concerning 11 junior campers' well-being
- Coordinated 2-3 activities daily for campers aged 9-11 over the course of six summers

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – Morgan Stanley 'Skills Challenge' Mentee | Remote

04/2023 – 06/2023

- Selected as 1 of 150 first-year athletes to participate in an eight-week fellowship designed to hone technical skills for a career in finance
- Received 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for finance roles
- Collaborated with a 5-person scrum team & Morgan Stanley mentor to deliver an investment thesis to the bank's Fixed Income Division

Christ Church at Short Hills – Ministry Director | Short Hills, NJ

09/2020 – 08/2022

- Scheduled and coordinated training events for church assistants, providing comprehensive instruction in procession and logistics, which helped to ensure that events ran smoothly, creating positive experiences for attendees and increasing overall satisfaction
- Recognized as the recipient of the Louis J. Batzle Award for exemplifying the highest standards of Christian faith, devotion, and service, reflecting a deep commitment to serving the church community and positively impacting the lives of others
- Facilitated communication and collaboration between the Board of Ministry Directors and relevant stakeholders to ensure the delivery of effective and efficient services, resulting in increased satisfaction and trust among stakeholders

Kent Place Computer Science Club – President | Summit, NJ

09/2019 – 06/2022

- Educated peers on fundamental computer science concepts, including cybersecurity and programming languages, enabling them to gain new skills and knowledge, and contribute to the field with confidence
- Coordinated with three board members to organize and lead biweekly meetings, which facilitated effective communication and collaboration, improved decision-making, and strengthened organizational performance
- Worked collaboratively with other clubs to teach members about data science and its real-world applications, creating unique learning opportunities and promoting interdisciplinary collaboration and innovation

Interfaith Food Pantry of the Oranges – Volunteer | Philadelphia, PA

09/2017 – 06/2022

- Mobilized the church youth program to collect canned goods for a Halloween Food Drive, resulting in the donation of a significant amount of food to those in need and fostering a sense of community involvement and service
- Screened packages and transported food to and from the food pantry, ensuring that it was properly stored and readily accessible for distribution, contributing to the overall efficiency and effectiveness of the pantry's operations
- Assisted in operations of the food pantry by distributing food to clients in need, restocking inventory, and organizing donations, resulting in the efficient delivery of services and contributing to the overall success of the pantry in meeting the needs of the community

BudDE Connect – Camp Counselor | Remote

07/2022 – 07/2022

- Mentored children of all ages with special needs, providing support and guidance, promoting their personal and academic development, and fostering a safe and inclusive environment that enabled them to thrive
- Created and facilitated diverse recreational activities for campers, promoting teamwork, creativity, and socialization, resulting in a fun and enriching environment that boosted their personal growth and enjoyment of the camp experience. Additionally, ensured their safety and well-being through active supervision
- Communicated with parents and families to provide updates on camp activities, camper progress, and answer any questions or concerns, creating a supportive and reassuring environment for parents and ensuring a smooth and stress-free camp experience for campers

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Running, Hiking, Traveling (I aim to join the 7 Continents Club & travel to Antarctica!)

CLAIRE B. XU

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EDUCATION

Dartmouth College – Hanover, NH

GPA: 3.85/4.0

B.A. in Economics Modified with Psychology | SAT: 1520

Anticipated Graduation: May 2025

- Accomplishments: NCAA Division I Student-Athlete (Dartmouth Women's Golf); WGCA All-American Scholar (2022)
- Relevant Courses: Financial Accounting, Games and Economic Behavior, Principles of Marketing, Quantitative Analysis of Social Data
- Industry Education: Building a Financial Model, Core Data Analysis, Core Financial Concepts, Finance Interview Prep, Valuation 1: DCF
- Leadership Events: Participated in Leadership Events with Bank of America, Deloitte, Evercore, Oliver Wyman & JP Morgan Chase & Co.

EXPERIENCE

Dartmouth Office of Pluralism & Leadership – *International Student Mentor* | Hanover, NH

08/2022 – Present

- Planned and led a 2-day orientation for 200+ students, providing information, explanations, and guide services to international students
- Facilitate high school to college transitions for students across international borders and provided personal guidance to 13 students who all achieved outstanding grades in the fall term, and personally thanked me for helping me ease their transition from high school to college
- Support international students through their transition to the US and incorporated the incoming class into campus culture through weekly check-ups and messages, providing on-going guidance, advice, feedback, and support to mentees that aligns with their specific goals/needs

Dartmouth Rassias Center for World Languages & Culture – *Mandarin Drill Instructor/Mentor* | Remote

09/2022 – Present

- Teach students at Dartmouth and high schools in the broader Hanover community Mandarin Chinese 4 times a week for 1 hour each, preparing learning materials and monitoring progress to help all students improve their proficiency, resulting in all students securing A's
- Familiarize Dartmouth and high school students with Chinese culture by introducing Chinese customs and games, allowing the students to appreciate the difference between the two cultures and encouraging them to be open-minded & accept different customs and traditions
- Document and report students' progress to the Professor and design tailored exercises that meet each student's unique needs and interests, which increased individual and classroom productivity, maximized attendance, and helped them gain confidence

DICK'S Sporting Goods – *Strategy Student Consultant* | Remote

01/2023 – 03/2023

- Designed a national marketing campaign to promote DSG's products to 100K+ new female customers for Women's History Month in 2023
- Owned the 'planning phase,' implementing Lewin's 3-Stage model to effectively plan the execution and implementation of the campaign
- Analyzed 3 factors to help DSG achieve 8% increase in Q1 net sales within 3 months of launch by highlighting BIPOC female athletes
 - **Unfreeze**: applied a current state analysis, analyzing previous campaigns to identify growth opportunities for new strategy
 - **Change**: created a 3-year roadmap to visualize the benefits of introducing a female-focused strategy with ethnically diverse leads
 - **Refreeze**: developed an operating manual to anchor the desired changes into DSG's organizational culture & solidify new 'state'

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – Women's Playmaker '23 (Team Lynette Woodard) | Remote

01/2023 – Present

- Selected as 1 of only 120 college women athletes to participate in a two-month fellowship to prepare for careers in competitive industries
- Analyze business challenges through systematic problem-solving frameworks (ADKAR, DMAIC, MECE, MEDDIC, PESTEL, SWOT)
- Collaborated with a scrum team of 5 to develop a multi-year strategy for DSG's Women's History Month initiative with a 5-week timeline
 - Technical Skills Acquired: Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development

Dartmouth Women's Golf – NCAA Division I Student-Athlete, Golfer | Hanover, NH

09/2021 – Present

- Train 20+ hours a week during in-season time periods and compete & contribute to every single lineup, while managing full academic load
- Cultivate strong time management skills with success on/off the course, earning Women's Golf Coaches Association All-American honors
- Engineer a positive team atmosphere & support teammates during training which allowed us to accomplish our first team win in 6 years

Superintendent Scholar Advisory – Scholar Advisor Representative | Federal Way, WA

09/2021 – 09/2022

- Developed district-wide strategies with the Superintendent to support student education, presenting the final plan to important stakeholders
- Analyzed student interactions through one-on-one interviews and provided feedback and recommendations about the learning atmosphere to the Superintendent (i.e., increased preparation for the SAT), which was successfully implemented by the school district the next year
- Emphasized student voices in the district through weekly reports to the Superintendent which increased inclusion efforts in planning the COVID online curriculum, and helped create a safe and supportive learning environment for students during the pandemic

National Honor's Society – President | Federal Way, WA

09/2019 – 06/2021

- Introduced, administered, and oversaw the execution of 6 new events during my first term, with volunteer attendance ranging from 15-50 guests, resulting in all 6 events becoming a permanent event/fixture on the volunteer calendar for the club in subsequent years
- Registered new networks and tunnels of communication to reach local community members in need of assistance which instilled confidence in our partner local organizations who knew they had a steady stream of volunteers that they can depend on
- Modified club structure to incorporate student output and enhance student participation and increased student attendance in meetings by 10% and volunteer sign-ups by 45%

NON-TECHNICAL SKILLS & INTERESTS

- Fun Fact: I have lived in 3 different countries!

CLEVELAND L. SELLERS, IV

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EDUCATION

University of Notre Dame – South Bend, IN

GPA: 3.3/4.0

B.A in Business Administration | SAT: 1320 | ACT: 30

Anticipated Graduation: May 2025

- **Accomplishments:** NCAA Division I Student-Athlete (Notre Dame Men's Soccer); Northwest School of the Arts Valedictorian (HS)
Placed 3rd Overall in Bank of America's Mental Health Case Competition (Received Unanimous 'MVP' Honors for Presentation)
- **Relevant Courses:** Foundations of Accountancy, Fundamentals of Finance, Foundations of Coding, Business Technology & Analytics
- **Industry Education:** Case Interview Prep 101, Creating Business Presentations, Intro. to Finance 101, MECE Part I & II, Pyramid Principle

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design business presentations for Fortune 500 companies
- **Customer Relationship Mgmt. (CRM) Training:** used the IDIC model to document student interactions for BofA
- **HubSpot Inbound Marketing:** implemented the flywheel concept to help BofA attract/retain students to new program
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in sprints to coordinate project activities and track goals, milestones, and OKRs

EXPERIENCE

United Health Group – *MAP Corporate Strategy Student Consultant; Development Team Member (Planning Phase)* | Remote **01/2023 – 03/2023**

- Designed a national “doula program” for UHG to positively impact 10k+ BIPOC mothers for Black Maternal Health Week between '23-26
- Owned the ‘planning phase,’ implementing HubSpot’s MARACA framework to expand UHG’s 2022 regional plan into national channels
- Analyzed market availability (MA), real-time analytics (RA) & customer addressability (CA) to drive program into 5+ new markets by '26
- Evaluated operating models for MAHEC & SC4S through McKinsey’s 7-S model to determine UHG’s ability to execute a \$1.5M budget
 - **Hard Elements:** Analyzed the strategy, structure, and systems for “Mountain Area Health Ed. Center” & “SistasCaring4Sistas”
 - **Soft Elements:** Analyzed the shared values, skills, style & staff for both organizations to determine org. design for new program

Bank of America – *MAP Strategy & Management Student Consultant; Development Team Member (Execution Phase)* | Remote **09/2022 – 11/2022**

- Created a new skill-based campus wellness program to reduce mental health disparities for BIPOC students on college campuses by 25%+
- Owned the ‘execution phase,’ creating a buyer persona to attract/engage/retain 1.5K+ college students by 2025 using the HubSpot flywheel
- Built and executed an “IDIC” CRM model that provided a 360° view of the student engagement process from acquisition through retention
 - **ID:** Conducted surveys to identify target audience; differentiated students based on unique insights collected from buyer persona
 - **IC:** Customized marketing strategy to inspire positive interactions with 1K students through affinity groups + required check-ins

The Coca-Cola Company – *College Ambassador* | North Bend, IN

07/2022 – 07/2022

- Attended an in-person conference to learn from Coca-Cola executives in the digital-marketing, distribution, and supply chain sectors
- Exposed to future Coca-Cola digital-marketing campaigns where I was talked through the intention and reasoning behind the designs
- Discussed how sustainability, DE&I, and a positive company culture contributes to Coca-Cola’s dominance of the soda market
- Pitched ideas on how Coca-Cola could utilize advertisements during the March Madness tournament to promote female collegiate sports

Krustaceans Seafood Restaurant – *Cashier* | Charlotte, NC

06/2020 – 08/2022

- Collaborated with 5 owners & 10 co-workers to provide an efficient and pleasurable dining experience, providing excellent client service
- Served food and processed payments in an expedient and professional manner to ensure patrons had an enjoyable dining experience
- Worked 97 shifts totaling 600+ hours of experience strong interpersonal skills (i.e., teamwork, multitasking, patience, prioritization)

NYLF Business Innovation – *Corporate Startup Project Member* | North Bend, IN

07/2022 – 07/2022

- Collaborated with a team of 5 members to design an innovative startup, leveraging the organization’s tools to test innovative business ideas
- Created an aesthetically appealing slide deck using Microsoft PowerPoint tools, providing potential investors with essential information
- Designed a business plan and proposal that received high praise from the judging panel—recognized as the best startup in the competition

LEADERSHIP & SPECIAL ACTIVITIES

Make A Play Foundation (MAP)

- Advanced Placement D-League Fellow (Team All-Access) | Remote **12/2022 – Present**
 - Selected as 1 of 96 high-achieving sophomores to participate in a professional development fellowship for minority athletes
 - Lead weekly all-hands meetings & manage a portfolio of complex initiatives required to consult multiple Fortune 500 companies
- Bank of America Play-In Tournament Participant | Remote **09/2022 – 11/2022**
 - Received 10+ hours of targeted interview prep., professional development coaching & industry-specific training for F500 roles
 - Collaborated with 5 pre-professionals to introduce a multi-year wellness strategy to BofA’s VP of Diversity Talent Acquisition

Evercore – 2023 Sophomore Diversity Seminar Investment Banking Simulation Participant | Remote

01/2023 – 01/2023

- Constructed financial models under time constraints to build acumen, receiving an accuracy percentage higher than the average participant
- Created a 12-slide pitch deck to present to a fictional company with recommendations on whether they should proceed with an acquisition that resulted in a great learning opportunity and the creation of a professional pitch deck template that can be utilized for other projects

DANIELLE BURKE

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[Linkedin Profile](#)

EDUCATION

Dartmouth College, Hanover, NH **June 2025**
GPA 3.81/4.0
Bachelor of Arts, Major in Sociology

Honors/Awards: Selected by Dean as an “emerging leader” in Class of 2025, a distinction bestowed upon only 5% of students

Relevant Coursework: Quantitative Analysis and Social Data (Statistics using Stata), Calculus, Research Methods

Tuck Business Bridge Program at Dartmouth, Hanover, NH **January 2024**

- Participated in a highly selective 3 week program taught by MBA faculty, developing skills in strategy, financial accounting, corporate finance, economics, spreadsheet modeling, marketing and management communication
- Conducted a team-based valuation analysis of the company Celsius, which included financial and strategic assessments, a DCF analysis, and a final presentation to Tuck MBA Faculty and established business executives

Georgetown Day School, Washington, DC **June 2021**

EXPERIENCE

QVEST – Consultant Intern **June 2024 – August 2024**

- Conducted research on target companies within the beauty and wellness sector of the consumer packaged goods market, and advised management on the most relevant technology for each company
- Collaborated with fellow interns to develop a reference architecture, final presentation, and training materials related to the beauty and wellness industry for Qvest company
- Developed a project timeline and coordinated regular status updates to ensure all interns were aligned with project goals and deadlines

PWC – Remote Consultant Intern **January 2024 – March 2024**

- Advised CEO ARE, a non-profit, while researching and analyzing complex problems ranging from financial goals, stakeholder management, and impact measurement
- Created and delivered presentation to PWC consultants and CEO ARE leaders with insights, trends, and recommendations to reach mission goals

Energy Innovation Capital - Remote Research Intern **February 2024 – March 2024**

- Conducted comprehensive market analysis to identify emerging trends, evaluate competitive landscapes, and uncover key opportunities for growth in the carbon to energy sector
- Conducted due diligence on a startup to prepare an investment summary to highlight viability and growth potential of prospective investments

LEADERSHIP & ACTIVITIES

Dartmouth Women's Varsity Soccer – Player **August 2021 – Present**

- Managed a year-round commitment of 20 hours per week for NCAA Division I games, practices, and off-season conditioning
- Developed exceptional time management and organizational skills to balance rigorous athletic and academic obligations

Ivy League Justice Coalition – Member **January 2023 – Present**

- Dartmouth representative in coalition of student athletes from eight Ivy League colleges addressing social justice issues
- Coordinated with other representatives and coaches to create ways to educate our teams and generate community awareness
- Organized guest speakers to come speak at team meetings, and organized weekly community service events for the team

D.R.IV.VE Certified – Member **June 2023 – August 2023**

- Accepted into 8-week leadership training course focussed on Development, Resilience, Ingenuity, Valor and Excellence
- Actively Engaged with peers and mentors during sessions to develop communication skills, conflict resolution, and leading my peers

Women in Business, Women in Innovation – Member **August 2023 – Present**

- Collaborated as a member of two female-led Dartmouth organizations that meet weekly to equip women with the qualitative and technical skills required to work in various business industries

SKILLS & INTERESTS

Computer: Proficient in Microsoft Office (Word, Powerpoint, Excel), familiarity with all social media marketing platforms, Stata

Languages: Spanish (conversational)

Additional Skills & Interests: Excellent organizational and time-management skills; strong interpersonal and communication skills; collaborative, painting and drawing

Derek J. Wong

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PROFESSIONAL EXPERIENCE

William Blair & Company

New York, NY

Investment Banking Analyst - Healthcare

July 2024 - Present

Investment Banking Summer Analyst - Corporate Advisory (Public Company M&A)

May 2023 - July 2023

- Supported all aspects of the M&A process by conducting due diligence, preparing marketing materials, managing client data rooms, building key financial analyses, and coordinating buyer outreach and diligence workflows

Selected Transaction Experience

Sell-side advisory for \$108 million sale of PhenomeX Inc. (Nasdaq: CELL) to Bruker Corp. (Nasdaq: BRKR) - Closed Oct. 2023

- Supported a strategic alternatives review for the company through an analysis of its historical financials, capital structure, and overall business model; led to the launch of an accelerated dual-process financing and M&A evaluation
- Conducted a cash break-even analysis that evaluated the projected cash burn and repayment of upcoming debt principal
- Contributed to the creation of an analyses that calculated the company's future tax savings and NOLs based on Section 382 limitations; presented findings to the CEO which contributed directly to determining a fair value of the company

Project EARTHESA - Sell-side advisory for ~\$160M EBITDA Healthcare Data Interoperability Platform (Pending)

- Developed over 150 pages of marketing materials within a two-week timeframe, showcasing key healthcare data market trends, solution suite and technology capabilities, and the platform's go-to-market and growth strategy
- Supported the due diligence process with over 25 buyers by managing Q&A and coordinating comprehensive diligence calls
- Developed historical pipeline analysis by refining and organizing raw data to highlight key trends and insights

Project OCTANE - Sell-side advisory for ~\$85M EBITDA Clearinghouse and Practice Software Platform (Pending)

- Collaborated with management to develop marketing materials that clearly articulated the company's positioning and strategy
- Maintained active communication with the client and prepared weekly materials to ensure alignment and project progress
- Facilitated meetings between the management team and over 40 potential buyers with tailored materials to lead discussions

Persient LLC

San Diego, CA

Investment Banking Summer Analyst, Sell-Side M&A

June 2022 - August 2022

- Collaborated with senior bankers to conduct due diligence and create detailed marketing materials for potential buyers
- Created an investment memorandum for a natural products manufacturer by analyzing key industry and financial trends

IQ-Analog Corporation

San Diego, CA

Business and Software Development Intern

June 2021 - August 2021

- Worked directly with the CEO to analyze current business trends and explore future expansion opportunities for the company
- Redesigned the company's graphical user interface in C++, enhancing the overall app layout and user experience

EDUCATION

Carnegie Mellon University, Tepper School of Business

Pittsburgh, PA

Bachelor of Science in Business Administration (Finance), Minor in Entrepreneurship with University Honors

May 2024

- **Cumulative GPA:** 3.95/4.0; **Major GPA:** 4.0/4.0; **SAT:** 1540
- **Honors/Achievements:** Beta Gamma Sigma Honor Society (top 10% of graduating class), Student-Athlete Academic Achievement Award, Dean's List (all semesters), ITA Scholar-Athlete (2021 - 2024)
- **Men's Varsity Tennis Team:**
 - Led the team in doubles wins and received All-UAA Second Team Honors at the first position
 - Won multiple national-level tournaments including two USTA National Level 1 Adult Open Doubles Titles
 - 20+ hour per week commitment for practices and matches while balancing a rigorous academic schedule

SKILLS AND INTERESTS

Licenses and Certifications: SIE, Series 63 and Series 79

Leadership: Make A Play Foundation - Junior Board Member

Interests: NFL, San Diego Padres, Los Angeles Clippers, Pickleball, Poker (2022 CMU Poker Champion) and Golf

DILLON HOLIFIELD

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EDUCATION

Dartmouth College – Hanover, NH

GPA: 3.3/4.0

B.A. in Government | Concentration in Economics

Anticipated Graduation: May 2025

- **Accomplishments:** NCAA Division I Student-Athlete (Dartmouth Varsity Football); Real Estate Club (Active Member)
- **Relevant Courses:** Economics 1: The Price System: Analysis, Problems & Policies; Economics 3: Essential Math for Economics Analysis
- **Industry Education:** Case Interview Prep 101, Creating Business Presentations, Intro. to Finance 101, MECE Part I & II, Pyramid Principle

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design business presentations for Fortune 500 companies
- **HubSpot Market Expansion:** implemented the MARACA model to evaluate growth opportunities for new UHG plan
- **Organizational Redesign:** strategized around the 7 key elements in McKinsey's 7-S model to evaluate two orgs.
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in sprints to coordinate project activities and track goals, milestones, and OKRs

EXPERIENCE

United Health Group – *MAP Corporate Strategy Student Consultant; Development Team Member (Planning Phase)* | Remote **12/2022 – 02/2023**

- Designed a national “doula program” for UHG to positively impact 10k+ BIPOC mothers for Black Maternal Health Week between '23-26
- Owned the ‘planning phase,’ implementing HubSpot's MARACA framework to expand UHG's 2022 regional plan into national channels
- Analyzed market availability (MA), real-time analytics (RA) & customer addressability (CA) to drive program into 5+ new markets by '26
- Evaluated operating models for MAHEC & SC4S through McKinsey's 7-S model to determine UHG's ability to execute a \$1.5M budget
 - **Hard Elements:** Analyzed the strategy, structure, and systems for “Mountain Area Health Ed. Center” & “SistasCaring4Sistas”
 - **Soft Elements:** Analyzed the shared values, skills, style & staff for both organizations to determine org. design for new program

Morgan Stanley – *Firmwide Strategy Student Consultant* | Remote

07/2022 – 08/2022

- Created a multi-channel financial wellness program for MS's Strategy & Operations team to enhance employee relationships post-COVID
- Introduced several initiatives (i.e., digital financial portal) to assess & address the financial concerns of Black/Hispanic workers at the bank
- Developed a 3-year action plan to reduce the % of Black/Hispanic workers worried about their financial futures from 61% to <50% by '25
- Presented results to MS's Strategy & Ops. team leveraging Pyramid & MECE principles to subdivide PowerPoint slides into small subsets

Credit Suisse – *HBCU Recruiting Student Consultant* | Remote

06/2022 – 07/2022

- Created a 3-year redesign strategy/roadmap to increase the % of HBCU applicants to summer internships and entry-level roles at the bank
- Analyzed CS's “Scholar's Program” through McKinsey's 7S model to assess the bank's progress to improve the profile of HBCU diversity
- Outlined the long-term vision needed to achieve the strategy by establishing S.M.A.R.T. goals to provide clarity for each year of the plan
- Presented results to CS's campus recruiting team leveraging Pyramid & MECE principles to subdivide PowerPoint slides into small subsets

LEADERSHIP & SPECIAL ACTIVITIES

Deloitte US – *MAP Entrepreneurial Leaders Mentee* | Remote

01/2023 – Present

- Meet with a Deloitte mentor twice a month to learn more about how Deloitte uses technology & creativity to elevate the human experience
- Receive technical training for case interviews, written case interviews & behavioral interviews with Deloitte mentor & senior professionals

Make A Play Foundation (MAP)

- Advanced Placement D-League Fellow (Gym Class Heroes) | Remote **12/2022 – Present**
 - Manage a portfolio of complex initiatives required to consult several Fortune 500 companies with a cross-functional case team
 - Analyze business challenges through systematic problem-solving frameworks (DMAIC, MECE, MEDDIC, PESTEL, SWOT)
- Training Camp Summer Scholar (Green Team) | Remote **06/2022 – 08/2022**
 - Received 35+ hours of targeted interview prep., professional development coaching & industry-specific training for F500 roles
 - Participated in various events with MAP's F500 partners to explore potential career paths in consulting/finance/operations/tech

Oliver Wyman – *Introduction to Consulting 101 Participant* | Remote

06/2022 – 08/2022

- Met with OW's “EMPOWERED” ERG to receive technical training for case interviews, written case interviews & behavioral interviews
- Developed business acumen through exposure to firm-wide functions including Business Services, Industrial Products, Private Capital, etc.
- Learned about OW's history and culture and the range of different projects the firm undertakes (i.e., automotive, energy, healthcare, travel)

Bank of America – *MAP Summer League Participant* | Remote

06/2022 – 08/2022

- Met with BofA's “D.E.A.L.” ERG to receive technical training in “banking” (i.e., company valuation, financial statement modeling, M&A)
- Met with BofA's “D.E.A.L.” ERG to receive technical training in “markets” (i.e., stocks vs bonds, drivers of markets, economic principles)
- Developed business acumen through exposure to firm-wide functions including Banking, Corporate Functions, and Global Capital Markets

NON-TECHNICAL SKILLS & INTERESTS

- **Fun Fact:** My favorite hobby is going hiking in the morning | **Interests:** Hiking, fishing, eating sushi, and interacting with animals.

DIMITRI C. NICHOLSON

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EDUCATION

University of Pennsylvania | Wharton School of Business – Philadelphia, PA

GPA: 3.8/4.0

B.A. in Marketing and Operations | Business Analytics

Anticipated Graduation: May 2024

- **Accomplishments:** NCAA Division I Student-Athlete (U. Penn Track & Field Team—Short Sprints); Personal Records (100m: 10.73; 200m: 22.20); Academic & Athletic All-State Honoree for Track & Field (2019); National Merit Scholarship (2019 Commended Student)
- **Relevant Courses:** Business Statistics, Calculus I, Calculus II, Intro to Marketing, Intro to Management, Macroeconomics, Microeconomics
- **Industry Education:** Creating Business Presentations 101, Intro to: Inclusion, Innovation & Impact, Operations, and Sales & Marketing

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design business presentations for Fortune 500 companies
- **HubSpot Inbound Marketing:** used Inbound Marketing fundamentals to create a sustainable DEI strategy for JPMC
- **IC Agile Training:** used agile fundamentals to lead a scrum team of ~10 using the cloud service, Air Table
- **Lean Six Sigma Training:** used lean six sigma's DMAIC framework to perform a current state analysis of a top bank
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in sprints to coordinate project activities and track goals, milestones, and OKRs

EXPERIENCE

The Kraft Heinz Company – Growth & Operations Student Consultant | Remote

08/2022 – 10/2022

- Created a brand renovation strategy for Kraft's Capri-Sun fruit drink to help achieve 85% compliance with Global Nutrition Targets by '25
- Redesigned the Capri-Sun "pouch" to attract new buyer demographics that were historically under indexed & prefer healthier food options
- Analyzed stakeholder/materiality engagement to measure ESG goals and introduce a Capri-Sun product that achieves 50% sugar reduction
- Provided a long-term financial algorithm to help Kraft achieve adjusted EBITDA growth of 2% – 3% & adjusted EPS growth of 4% – 6%

Sound Point Capital Management – Summer Financial Analyst | New York, NY

05/2022 – 08/2022

- Conducted extensive research for a \$27 billion asset management firm with expertise in the credit markets on their investment process(es)
- Created, organized, developed, edited, and presented individual credit and broader thematic market & industry reports to senior leaders
- Worked with a diverse product line that included hedge funds, drawdown funds, CLOs, mutual funds, and separately managed accounts
- Analyzed industry research reports, data, and daily business news to help the firm identify new investment opportunities across product line

Anheuser-Busch – Research & Development Student Consultant (Winning Team) | Remote

05/2022 – 07/2022

- Introduced a new canning line for an RTD product to replace Cacti Agavi Seltzer & help AB surpass 3% domestic spirit volume in the U.S.
- Created a branding strategy to enhance the experience for new customers & achieve 4.5% revenue growth by 4Q24 against a \$13M budget
- Implemented the SCOR method to evaluate the supply chain and S&OP and measure AB's goal to grow the RTD portfolio by 163% by '24
- Developed a joint business planning deck to clearly & effectively communicate a national sales story for the seltzer & its innovation items

Heineken USA – Strategy & Insights Student Analyst; Scrum Master | Remote

03/2022 – 05/2022

- Oversaw the scrum/development team, ensuring each member executed the plan to drive Heineken's expansion into North America & U.S.
- Developed a strategic implementation roadmap to visualize the key outcomes needed to achieve 15% beer volume growth by the end of '23
- Led benchmark analysis to compare Heineken's 2021 fiscal performance to other F&B companies with significant market share in the U.S.
- Established a focused cost-reduction program to meet Heineken USA's budget, lower the overall cost-base & solve profitability challenges

Credit Suisse – Strategy & Analytics Student Consultant | Remote

02/2022 – 03/2022

- Created a 3-year redesign strategy/roadmap to increase the % of women applicants to summer internships and entry-level roles at the bank
- Analyzed CS's Gender 3000 report through McKinsey's 7S model to assess the bank's progress to improve the profile of gender diversity
- Outlined the long-term vision needed to achieve the strategy by establishing S.M.A.R.T. goals to provide clarity for each year of the plan
- Presented results to CS's campus recruiting team leveraging Pyramid & MECE principles to subdivide PowerPoint slides into small subsets

JP Morgan Chase & Co. – Commercial Banking Student Consultant | Remote

12/2021 – 02/2022

- Created a sustainable diversity, equity, and inclusion strategy and presented to the Campus Recruitment team at JPMC with a team of five
- Performed a current state analysis of JPMC's DEI practices using lean six sigma's DMAIC framework to address risks in today's process
- Designed a change management strategy using the ADKAR model for business change to integrate the strategy into current business cycles
- Implemented HubSpot Inbound Marketing tools to build inclusion into the corporate infrastructure & create high retention levels for talent

Boys and Girls Clubs of America – Youth Development Coordinator | Remote

05/2021 – 09/2021

- Established program objectives consistent with organizational goals and missions, and identified processes, deadlines, and milestones
- Demonstrated leadership to ensure conduct, safety, and personal development, all while creating a nurturing/communicative environment
- Contributed to effective planning, development, implementation, and evaluation of programs, services, and activities to achieve org. goals
- Developed a club environment that facilitated the achievement of youth development outcomes, and planned programs for start to finish

LEADERSHIP & SPECIAL ACTIVITIES

Make A Play Foundation (MAP) – D-League Fellow; Captain (Team New Era)

01/2022 – Present

- Selected as one of only 25 captains to lead a cross-functional team of ~10 student-athletes through a professional development fellowship
- Lead weekly all-hands meetings & manage a portfolio of complex initiatives required to consult five Fortune 500 companies within a year
- Analyze business challenges through systematic problem-solving frameworks (ADKAR, DMAIC, MECE, MEDDIC, PESTEL, SWOT)

Bank of America – Careers Launchpad Diversity & Inclusion Forum Participant (Market Makers)

02/2022 – 03/2022

- Selected to meet with BofA's recruiters to experience business-specific seminars, panel discussions on DEI & small group networking
- Learned how client-facing businesses in 'Market Makers' provide financial solutions to individuals, institutions & companies of all sizes

EDWARD E. TURNER III

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EDUCATION

Columbia University – New York, NY

GPA: 3.2/4.0

B.A in Arts of Architecture

Anticipated Graduation: May 2023

- **Accomplishments:** NCAA Division I Student-Athlete (Columbia Men's Basketball); Former Accounting Intern (Onyx LLC Construction)
- **Relevant Courses:** R.E.F.M 1-3, Wall Street Prep: Real Estate Financial Modeling, Private Equity Master Class, PowerPoint Crash Course
- **Industry Education:** Building a Financial Model, Core Data Analysis, Core Financial Concepts, Finance Interview Prep, Valuation 1: DCF

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design business presentations for Fortune 500 companies
- **HubSpot Inbound Marketing:** used Inbound Marketing tools to create a market entry strategy for a top CPG co.
- **IC Agile Training:** used agile fundamentals to lead a scrum team of ~10 using the cloud service, Air Table
- **Lean Six Sigma Training:** used lean six sigma's DMAIC framework to improve Heineken's performance in the U.S.
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in sprints to coordinate project activities and track goals, milestones, and OKRs

EXPERIENCE

Bank of America – *Incoming Investment Banking Summer Analyst* | New York, NY

06/2023 – 08/2023

- Expected to participate in due diligence sessions, communication, and interaction with deal team members
- Expected to develop/maintain complex financial models, performing various financial analyses, including valuations/mergers/acquisitions
- Expected to conduct comprehensive and in-depth company and industry research, preparing presentations and other materials for clients
- Expected to manage several projects at once and work effectively as an individual and as part of a team

The Davis Companies – *Private Equity Acquisitions Summer Analyst* | Remote

06/2022 – 08/2022

- Conducted research & due diligence on specific acquisition targets, industry verticals & niches for an integrated real estate investment firm
- Analyzed industry data & built frameworks for comparing/contrasting attributes & qualities of industries for investment thesis development
- Complied historical financial information, developing forward-looking projections, and building valuation models (i.e., DCF, LBO, comps)
- Presented final work via PowerPoint to senior deal professionals at the firm on a regular basis and received immediate on-the-job feedback

Arctos Sports Partners – *Private Equity Student Analyst* | Remote

05/2022 – 07/2022

- Presented a buy, sell, hold recommendation, and price target for Madison Square Garden Sports (NYSE: MSGS) to Arctos' leadership team
- Conducted a creative & resourceful due diligence process that included researching SEC filings, investor presentations and industry reports
- Created a PowerPoint presentation that included an investment thesis, business model, industry overview, valuation & growth opportunities
- Leveraged Microsoft Excel to create summary tabs of: income statements/balance sheets, financial projections, and valuation calculations

Heineken USA – *Strategy & Insights Student Analyst* | Remote

03/2022 – 05/2022

- Created a go-to-market strategy for Heineken USA that outlined the clear action plans and steps needed to succeed in the U.S. marketplace
- Developed a strategic implementation roadmap to visualize the key outcomes needed to achieve 15% beer volume growth by the end of '23
- Led benchmark analysis to compare Heineken's performance in the U.S. to other F&B companies with significant market share in the U.S.
- Established a focused cost-reduction program to lower Heineken's overall-cost base/solve profitability challenges against a \$34MM budget

LEADERSHIP & SPECIAL ACTIVITIES

Make A Play Foundation (MAP) – D-League Fellow (Team Haymaker); Finance Track

03/2022 – Present

- Selected out of 400+ applicants to work on a case team with five other student-athletes, owning a distinct aspect of a project each month
- Manage a portfolio of complex initiatives with a scrum team of ~10 to consult five different Fortune 500 companies within a calendar year
- Analyze business challenges through systematic problem-solving frameworks (ADKAR, DMAIC, MECE, MEDDIC, PESTEL, SWOT)
- Present results to Make A Play's senior leadership team and implement recommendations using both qualitative and quantitative methods

JP Morgan Chase & Co. – MAP Early Education Series Participant

03/2022 – Present

- Meet with different members of JPMC's Commercial Banking team once a month to learn more about Commercial and Corporate Banking
- Develop business acumen through exposure to firm-wide functions including Commercial Real Estate, Midsized Businesses, and Startups
- Learn how the firm manages relationships across the firm/globally in accordance with Corporations, Financial Institutions & Public Sector

Sponsors of Educational Opportunities (SEO) – Career Intern

01/2022 – Present

- Receive 100+ hours of individualized coaching and online instruction to achieve targeted technical and professional developmental goals
- Learn the fundamentals of Investment Banking and Real Estate necessary to compete for internship opportunities in competitive industries
- Complete industry-specific training and assessments focused on developing technical skills specific to Asset and Wealth Management

Columbia University Men's Basketball Team – NCAA Division I Student-Athlete

08/2019 – Present

- Devote 25+ hours a week to: practice/training, film sessions, individual and team meetings, games, tutoring, travel, and community service
- Provide thoughtful leadership that is inclusive, transparent & empowering & supports the team's goal to develop teammates on/off the field
- Develop a results-oriented focus & skills in: communication, critical thinking, accountability, resiliency, teamwork, and time management

Bank of America – MAP Finance Summer League Participant

06/2022 – 08/2022

- Developed business acumen through exposure to firm-wide functions including Banking, Corporate Functions, and Global Capital Markets
- Met with BofA's "D.E.A.L." ERG to receive technical training in "banking" (i.e., company valuation, financial statement modeling, M&A)
- Met with BofA's "D.E.A.L." ERG to receive technical training in "markets" (i.e., stocks vs bonds, drivers of markets, economic principles)

NON-TECHNICAL SKILLS & INTERESTS

- **Interests/Fun Fact:** (1) 3D Architectural Modeling, Iron Man; (2) One of 2 Sets of Twins in Family; (3) Played for NBA Star Brandon Roy

EVA F. ELBAZ

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EDUCATION

Princeton University

B.A. in Economics | Minor in Finance - GPA : 3.6/4.0

Princeton, NJ

Anticipated Graduation : May 2026

- Relevant Courses: Corporate Finance, Econometrics, Statistics and Data Analysis, Math for economy (Multivariable), Macroeconomics,
- Independent Paper: " Do cultural differences impact assimilation? "

Bradenton, FL

Sept. 2020 – June 2022

IMG Academy | High school – GPA : 3.8/4.0

- Devoted 30+ hours a week to practice tennis, travelled to 20+ countries, world ranked 125 in juniors, (top 3 in France)

EXPERIENCE

Ernst & Young (EY) – Incoming M&A Analyst

Paris, FR

Summer 2024

- Work on the origination and execution of mid-cap deals
- Execute various tasks in relation to sell-side mandates: preparation of teaser, information memorandum
- Analysis of risks associated with operations, results, forecast
- Preparation of pitches including financial models and valuation tools
- Skills: Corporate financial & accounting skills, Excel & PowerPoint

Ernst & Young (EY) | Talent Attraction & Acquisition Specialist

Paris, FR

May – Aug. 2023

- Helped EY's Global Talent Acquisition Team source, attract & hire people with diverse backgrounds
- Assisted the team in developing strategic sourcing solutions including building talent pipeline to attract and acquire high quality candidates
- Gained insight into the recruiting process for people hoping to enter the audit & financial advisory professions (+500 recruitments per year)
- Scheduled 100+ candidate interviews, spending 50+ hours on the phone with candidates and interviewers to prepare them for recruitment
- Skills: Excel, project management teamwork, communication

LEADERSHIP & ACTIVITIES

Princeton University Tennis Team | NCAA Division I Student-Athlete

Princeton, NJ

Aug. 2022 - Present

- Devote 25+ hours a week to: practice/training, film sessions, individual and team meetings, games, tutoring, travel, and community service
- Team captain, setting expectations and fostering a positive culture that has enabled our team to succeed
- Accomplishments : 2nd round NCAA Championships (2023 & 2024); Ivy League Champion (2023 & 2024)

Athlete to Mentor | Mentoring students

Princeton, NJ (Remote)

Sept. 2023 – Present

- Mentor middle school and high school student-athletes aspiring to play Division 1 Tennis. My guidance covers various aspects, including training, nutrition, college recruiting, and cultivating a positive mindset to thrive in college
- Conducted bi-weekly meetings over a 6-month period, ensuring consistent and personalized support for mentees in their athletic and academic pursuits

World Maccabiah Games

Jerusalem, ISRL

June – July 2021

- Silver medalist in doubles and singles in the women's tennis division at the 21st World Olympics games
- Captain of the French Division among 3,000 athletes

INTERESTS & CERTIFICATION

- Certification: Accounting Crash Course Wall Street Prep
- Clubs: Scholars of Finance, Women in Economics and Policy, Business Today, University Cottage Club, Make a play foundation (MAP)
- Languages: French (native speaker), English (fluent), Spanish (proficient)

FRED A. WARE

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EDUCATION

Washington University in St. Louis – St. Louis, MO

GPA: 3.88/4.0

B.A. in Finance, Organization & Strategic Management | Minor in Business of Sports

Anticipated Graduation: Spring 2026

- **Accomplishments:** NCAA Division III Student-Athlete (Football), Vice President (Billiards Club), Varsity Football Captain (Hebron High School Football), Football Representative (Hebron High School Principal Advisor Committee)
- **Relevant Courses:** Accounting 1, Management Environment, Managerial Statistics 1, Foundations of Business, Intro to Microeconomics
- **Industry Education:** Case Interview Prep 101, Creating Business Presentations, Intro. to Finance 101, MECE Part I & II, Pyramid Principle

EXPERIENCE

Oliver Wyman – *Air Transportation Student Analyst; Scrum Master* | New York, NY (Remote)

February 2024 – Present

- Managed a team of 5 tasked with delivering a 30-year growth strategy to OW in 5 weeks, reimagining the way airports operate by 2055
- Re-engineered the workflow process by overseeing weekly deliverables for 5 sprints (i.e., initiation, planning, execution, control, closure), delivering a final 12-page client presentation to Oliver Wyman's Campus Recruiting Team and senior leaders to formally close the project
- Directed weekly discussions with team and OW mentor to determine the scope of ~10 workstreams (i.e., project charter, phoenix checklist, feasibility study, marketing strategy, benchmarking analysis, budget, user journey map), resulting in a 40% faster turnaround process for all

Washington University Recreation – *Intramural Supervisor* | St. Louis, MO

January 2023 – Present

- Direct participants of 20+ intramural sports leagues by checking registered players, setting up game equipment & explaining the rules
- Oversee a team of 4 scorekeepers or officiators, ensuring that the officials knew and enforced all the rules and that scores were accurate
- Enforce sportsmanship, respect, and fair play for 25 different sports leagues, resulting in no verbal or physical altercations and the removal of individuals that would cause harm, collaborating with 11 supervisors on weekly shift scheduling & selecting assigned hours

United Health Group (UHG) – *Management Student Consultant; Scrum Master* | Remote

July 2023 – August 2023

- Achieved 1st Place out of 32 teams after overseeing the initiative to introduce a certified doula program to UHG for Black Maternal Health Week in 2024, developing a business transformation strategy to assist Black & low-income women during pregnancy, birth & postpartum
- Onboarded team by hosting a 2-hour project kick-off, establishing objectives/key results (OKRs), explaining agile/scrum processes, and scheduling weekly sprint reviews, collaborating to create/submit a project charter with a schedule of tasks/milestones by end of the meeting
- Approved and submitted a final 12-page slide deck + a single master document outlining the materials produced by the project and how they have been organized to UHG's leadership team, formally closing the project & transferring all materials and solutions to VP of DEI

Morgan Stanley – *Fixed Income Student Analyst; Risk (Team Eric Yuan)* | Remote

April 2023 – June 2023

- Selected to participate in an invite-only case competition with Morgan Stanley's Fixed Income Division, developing an investment thesis for MD, Stephen Dance, to recommend the best asset for a client to invest in through '23 (i.e., treasuries, equities, investment grade credit)
- Created a color-coded risk assessment matrix to define the varying risk levels associated with recommending a new asset class to a client, specifically considering downsides/headwinds in my 5-person scrum team's investment thesis & consolidating risks into a single chart
- Produced a profit target in Microsoft Excel to provide a clear idea of profit potential versus how much our team's client might potentially lose when investing in our asset, supplementing our spreadsheet with a 4-step mitigation strategy to avoid/reduce/transfer/accept all risks
- Updated and actively monitored the team's project management workflow on Air Table, "owning" the monitoring phase of the project, streamlining the process of achieving goals by completing all deliverables 2 weeks ahead of schedule (i.e., risk assessment, profit target)

CryoConcepts of Plano West – *Cryotherapy Representative* | Plano, TX

January 2022 – August 2022

- Managed the front desk, checking in 100+ current customers and new registrants, scheduling future appointments & collecting payments
- Updated business statistics daily such as daily revenue earned, new customers, returning customers, and activities done in the facility
- Operated 4 types of therapy treatments for customers: venom heat therapy, cupping, the cryo-chamber, and applying Normatech machines
- Handled opening and closing procedures in the facility by charging equipment, tracking data, and cleaning up workspaces

LEADERSHIP & COMMUNITY DEVELOPMENT

Washington University Varsity Football Team – NCAA Division III Student-Athlete | St. Louis, MO

August 2022 – Present

- Volunteered at a St. Louis area elementary field day event with 40 student-athletes, introducing 100+ kids to healthy exercise
- Oversaw referees, encouraged sportsmanship, and monitored player/official relations, resulting in 0 ejections on any of my shifts
- Communicated lifting times, mandatory meals, film study, and game day schedule to teammates, helping with team time management

Washington University Kids Field Day – Group Leader | St. Louis, MO

November 2022 – November 2022

- Supervised 8+ 3rd graders at the field day event, making sure the kids were practicing safety, fairness, hydration and equal opportunity
- Encouraged participation in the games, explaining the objective to win the game, and splitting them into teams to foster competition
- Discussed the importance of cooperation with teammates, showing them the value of winning a game with their friends and how to encourage each other throughout the competitive events

Hebron High School Principal Advisory Committee – Football Representative | Carrollton, TX

August 2021 – May 2022

- Surveyed teammates for monthly meetings, collecting feedback on cafeteria food meals, faculty, and student relations with one another
- Collaborated with 16 students and our principal to improve campus life, creating assembly presentations for events and faculty feedback
- Held one-on-one meetings with the principal, discussing school observations, the football team, and specific areas of improvements

Hebron High School Football – Varsity Football Captain | Carrollton, TX

April 2021 – December 2021

- Led offseason competition exercises for 12 teammates, picking teammates for specific competitions, and correcting in-play mistakes
- Communicated information from coaches including position meetings, practice and game schedule, lifting hours, and instructions
- Encouraged my teammates with speeches, instilling confidence for competition as well as on field encouragement to keep spirits up

NON-TECHNICAL SKILLS & INTERESTS

- **Interests:** Lifting, sports, Marvel, pool, sports business, Christianity.

GANNON S. MCCORKLE

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EDUCATION

Dartmouth College – Hanover, NH

GPA: 3.8/4.0

B.A in Economics | Minor in Environmental Studies & Public Policy

Anticipated Graduation: June 2024

- **Accomplishments:** NCAA Division I Student-Athlete (Dartmouth Football Team); 2021-2022 Ivy League Champion; College Honors List; Citation in “Nationalism in War”; The Eskie Clark Award; Chick-fil-A Leadership Scholar; The Hinckley-Steedman Fund Scholarship; SEO EDGE Participant; BCG Summer Session Participant, Citi Freshman Discovery Program, Goldman Sachs 2021 Virtual Insight Series
- **Relevant Courses:** Calculus, Environmental Studies & Society, Macroeconomics, Microeconomics, Spanish II, Spanish III, Statistics
- **Industry Education:** Building a Financial Model, Core Data Analysis, Core Financial Concepts, Finance Interview Prep, Valuation 1: DCF

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design business presentations for Fortune 500 companies
- **HubSpot Inbound Marketing:** used Inbound Marketing fundamentals to create a sustainable DEI strategy for JPMC
- **IC Agile Training:** used agile fundamentals to lead a scrum team of ~10 using the cloud service, Air Table
- **Lean Six Sigma Training:** used lean six sigma’s DMAIC framework to perform a current state analysis of a top bank
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in sprints to coordinate project activities and track goals, milestones, and OKRs

EXPERIENCE

McKinsey & Company – *First Year Leadership Academy Participant; Incoming Summer Business Analyst* | Remote

06/2021 – Present

- Selected as one of the top 70 rising sophomores to participate in a 2-day exhaustive conference to refine problem-solving/leadership skills
- Participated in workshops to advance professional growth and developed key skills to become an impactful and successful consultant
- Expected to work with McKinsey colleagues & fellow interns to receive real-world experience as a Sophomore Summer Business Analyst

Heineken USA – *Strategy & Insights Student Analyst; Scrum Master* | Remote

03/2022 – 05/2022

- Oversaw the scrum/development team, ensuring each member executed the plan to drive Heineken’s expansion into North America & U.S.
- Developed a strategic implementation roadmap to visualize the key outcomes needed to achieve 15% beer volume growth by the end of ‘23
- Led benchmark analysis to compare Heineken’s 2021 fiscal performance to other F&B companies with significant market share in the U.S.
- Established a focused cost-reduction program to lower Heineken’s overall-cost base/solve profitability challenges against a \$34MM budget

Credit Suisse – *Strategy & Analytics Student Consultant* | Remote

02/2022 – 03/2022

- Created a 3-year redesign strategy/roadmap to increase the % of women applicants to summer internships and entry-level roles at the bank
- Analyzed CS’s Gender 3000 report through McKinsey’s 7S model to assess the bank’s progress to improve the profile of gender diversity
- Outlined the long-term vision needed to achieve the strategy by establishing S.M.A.R.T. goals to provide clarity for each year of the plan
- Presented results to CS’s campus recruiting team leveraging Pyramid & MECE principles to subdivide PowerPoint slides into small subsets

JP Morgan Chase & Co. – *Commercial Banking Student Consultant* | Remote

12/2021 – 02/2022

- Created a sustainable diversity, equity, and inclusion strategy and presented to the Campus Recruitment team at JPMC with a team of five
- Performed a current state analysis of JPMC’s DEI practices using lean six sigma’s DMAIC framework to address risks in today’s process
- Designed a change management strategy using the ADKAR model for business change to integrate the strategy into current business cycles
- Implemented HubSpot Inbound Marketing tools to build inclusion into the corporate infrastructure & create high retention levels for talent

Chick-fil-A – *Assistant Manager, IT Specialist* | Fairfax, VA

02/2017 – 08/2021

- Worked to address bottlenecks within the business to help grow revenue by more than 20% over the past 2 years
- Trained more than 70 new employees on operating procedures over five years with a focus on a fun, energetic work environment
- Helped grow the warm and welcoming environment through customer engagement and service

McCorkle Landscaping Co. – *Founder* | Bowie, MD

06/2011 – 08/2016

- Founded a lawn care business at the age of ten—generated over \$15,000 in revenue over five summers to support family’s financial needs
- Grew the business to include additional services (i.e., snow removal, leaf raking) and gained 30+ customers, managing multiple jobs a day
- Managed two employees, including scheduling logistics, delegating on-site duties, and monitoring the progress of landscaping projects

LEADERSHIP & SPECIAL ACTIVITIES

Make A Play Foundation (MAP) – D-League Fellow; Captain (Team Franchise Tag)

01/2022 – Present

- Selected as one of only 25 captains to lead a cross-functional team of ~10 student-athletes through a professional development fellowship
- Lead weekly all-hands meetings & manage a portfolio of complex initiatives required to consult five Fortune 500 companies within a year
- Analyze business challenges through systematic problem-solving frameworks (ADKAR, DMAIC, MECE, MEDDIC, PESTEL, SWOT)

JP Morgan Chase & Co. – MAP Early Education Series Participant

01/2022 – Present

- Meet with different members of JPMC’s Commercial Banking team once a month to learn more about Commercial and Corporate Banking
- Learn how the firm manages relationships across the firm/globally in accordance with Corporations, Financial Institutions & Public Sector

UBS Group AG (UBS) – Executive Leadership Summit for Student Athletes Representative

01/2022 – 01/2022

- Selected to meet with UBS’s Managing Director, Johan van Duynvendijk, to learn about management theories and leadership best practices
- Critically assessed how culture affects organizations and learned how to create an environment that promotes the advancement of all people

Independent Exeter Student Relief Fund (Phillip Exeter Academy) – Founder & President

03/2020 – 09/2020

- Founded a student-led non-profit organization that works with members of the Exeter community to support those disproportionately affected by the pandemic—independently raised \$10,500+ in the first month of fundraising from classmates, friends, and family members
- Provided stipends (\$500+ on average) to 10+ students and their families, and inspired other boarding schools to create their own funds

George Lester III

Atlanta, Georgia

georgelester24@gmail.com | 678.814.3191 | [LinkedIn profile URL](#)

EDUCATION

Morehouse College - Cumulative GPA: 3.94

Atlanta, Georgia

Bachelor of Arts, Business Administration: Finance concentration

May 2024

Honors/Awards: Beta Gamma Sigma (International Business Honor's Society), Dean's List, Southern Intercollegiate Athletic Conferene All-Academic Team (2021-2023), Highest GPA among all Morehouse College Student-Athletes (2023)

Relevant Coursework: Financial Statements Analysis, Principles of Accounting I & II, Business Policy & Strategy

EXPERIENCE

JPMorgan Chase & Company

New York, New York

Investment Banking Summer Analyst

June 2023 – August 2023

- Assisted the Equity Capital Markets team in executing transactions and projects focused on the technology sector, contributing to the successful completion of processes for IPOs, secondary offerings, and equity-linked transactions
- Conducted comprehensive market research and analysis to identify optimal conditions for our clients to issue equity
- Assisted in the preparation and delivery of presentations to clients, investors, and internal stakeholders
- Presented to senior-level employees on a variety of topics regarding private and public equity issuance, including a culminating pitch for a near-term raise of equity capital

JPMorgan Chase & Company

New York, New York

Corporate & Investment Banking Fellow

June 2022 – July 2022

- Participated in an intensive program focused on developing the skills and knowledge necessary for a career in investment banking
- Engaged training sessions covering financial analysis, valuation, deal structuring, and other key investment banking concepts
- Conducted a comprehensive assessment and advisory on Liberty Bank's digital banking approach, analyzing technology infrastructure, customer experience, and operational processes
- Conducted a comprehensive, group case study simulating the roles of various groups with the investment bank to execute an M&A transaction

University Growth Fund

Atlanta, Georgia

Associate

May 2021 – June 2022

- Conducted thorough due diligence on potential investment opportunities across multiple industries
- Evaluated market size of Carputty, an auto financing company with a Total Addressable Market (TAM) exceeding \$100B
- Analyzed exit opportunities and projected cash multiple returns for Tiled, a low-code presentation tech company

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Morehouse College Baseball Team

Atlanta, Georgia

Student-Athlete

August 2020 – Present

- Demonstrate effective communication and teamwork skills, fostering collaboration and synergy among teammates
- Maintain fitness and conditioning through daily training regimens, ensuring optimal performance during games and practices
- Recognized for maintaining high performance in athletics and academics, demonstrating dedication and time management skills

Bain & Company

Atlanta, Georgia

Freshman Leadership Accelerator Program Participant

March 2021 – June 2021

- Engaged a rigorous curriculum covering core business topics including strategy, operations, and problem-solving methodologies
- Participated in interactive workshops and training sessions focused on communication, presentation skills, and effective teamwork

Sponsors for Educational Opportunity

Atlanta, Georgia

SEO Edge Participant

March 2021 – Present

- Connected with a network of industry specialists and completed technical training for investment banking

Other Affiliations: Howard Thurman Honors Program, Investment & Finance Club, Morehouse Business Association, Morehouse Consulting Club, Student Leadership Ambassador

OTHER SKILLS & INTERESTS

Computer: Microsoft Applications (Excel, Word, PowerPoint & Outlook)

Interests: Music, Fitness, Sports

GRACE Y. ZHOU

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EDUCATION

Columbia University – New York, NY

GPA: 4.0/4.0

B.S. in Financial Economics & Computer Science – Math | SAT: 1560

Anticipated Graduation: May 2026

- **Accomplishments:** NCAA Division I Athlete (Swimming); Ivy League Championship Finalist; New Jersey State Record Holder; Valedictorian and Graduation Commencement Speaker; Junior National Qualifier
- **Relevant Courses:** Macroeconomics, Microeconomics, Econometrics, Calc-Based Statistics, Financial Economics
- **Wall Street Prep Education by 2024:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

EXPERIENCE

Bank of America – *Equity Research Student Analyst (Team Janet Yellen)* | Remote

September 2023 – November 2023

- Compiled extensive research, market data, and financial models to construct a thorough investment thesis outlining and defending the best asset classes a potential client at Bank of America should invest in given the macroeconomic conditions of 2023 (minimum of 3 securities)
- Communicated with project leader, two other group members, and a BofA mentor (VP/Trading Strategist II, [Cait Walsh](#)), on project progress & results for feedback and collaboration that enhanced the investment thesis to include multiple diverse perspectives and analyses
- Performed a PESTEL analysis, organizing each element of market research data by category + impact to streamline efficiency/prioritization on asset class and portfolio analysis, creating a well-organized list that made writing the investment thesis efficient and effective
- Reviewed the final end result of the research information and investment thesis with project members during the weekly hour meeting to ensure everyone was well-informed and prepared to build upon the completed work for their roles/responsibilities and our final stock pitch

Lifetime Aquatics – *Assistant Manager* | Bridgewater, NJ

May 2023 – August 2023

- Managed employees by conducting evaluations, facilitating in-service training sessions, and providing comprehensive training for new hires in complex work processes, resulting in increased productivity and efficiency in daily operations
- Calculated profit and loss data spreadsheets, enabling budgeting of costs at 20-30% of gross sales, and conducted financial analyses to identify departmental improvements, leading to the achievement of monthly revenue goals
- Utilized graphic design skills to create advertisements for offered programs, resulting in a remarkable 23% increase in sales

Personal Entrepreneurship Startup – *Lifeguard and Swim Instructor* | New Jersey

June 2021 – August 2023

- Successfully advertised my business through a combination of social media and word-of-mouth marketing strategies, consistently establishing a client base of 12-15 clients every summer
- Adapted teaching methods to align with each client's skill level, goals & learning needs, establishing professionalism & trust with clients
- Evaluated the revenue-to-cost ratio for each client, allowing for the most efficient and cost-effective scheduling of my time, ultimately generating profits of approximately \$5,000 to \$6,000 every summer

LEADERSHIP & COMMUNITY DEVELOPMENT

Arctos Sports Partners – MAP Elite 100 Investment Fellow | Remote

November 2023 – Present

- Selected as 1 of 100 second-year athletes to participate in a five-part fellowship designed to prepare BIPOC students for careers in banking
- Receive 20+ hours of virtual instruction in accounting, technical interview preparation & industry-specific training for future banking roles

Columbia University Varsity Swimming – Student Athlete | New York, NY

October 2022 – Present

- Successfully adapted to the demands of a college student-athlete, which included 25+ hour practices and a rigorous course load, culminating in not only making the championship team but also maintaining a stellar 4.0 GPA
- Demonstrated year-long commitment to training and exceptional performance under pressure during in-season meets, leading to selection as one of the 17 members of the Ivy League Championship team out of a pool of 40 athletes
- Refocused training & racing strategies to bolster mental state and self-confidence, culminating in a remarkable 5-second time improvement

HuaXia Chinese School – Chinese Class TA & Office Assistant | Bridgewater, NJ

September 2019 – June 2022

- Taught students ranging from Kindergarten to 9th grade to not only enjoy learning the language but also appreciate Chinese culture by incorporating entertainment and media into the teaching materials, resulting in a 100% success rate for the students
- Collaborated actively with the administration and office staff to plan and organize an annual Chinese New Year Gala for three consecutive years, expanding from an inner-school event to a broader community-wide celebration
- Volunteered an additional 5-10 hours per week after school to provide personalized tutoring to students in need of extra attention, particularly those without a Chinese background, by tailoring teaching plans to their learning strengths

Bridgewater-Raritan HS Girls Swim Team – Captain | Bridgewater, NJ

October 2021 – February 2022

- Coordinated separate monthly in-service meetings with the 16 swim instructors and 32 lifeguards to review safety regulations and responsibilities, go over their evaluation scores, and collect feedback from the team, ensuring continued safety in daily operations and increase productivity and efficiency in team members' roles and responsibilities
- Coordinated bi-monthly team-bonding events, such as movie nights, Chipotle dinners, and birthday/holiday celebration parties, during work after-hours, resulting in speedy integration of new employees into the team, a stronger team culture between lifeguards and swim instructors, and an improvement in employee well-being

Camp Science Around Us – Non-Profit Co-Founder | Remote

July 2020 – August 2020

- Founded a one-week non-profit online science summer camp aimed at engaging kids aged 10-12 during the pandemic, helping them discover and cultivate their interest and passion for science by utilizing observations and experiences, leading to a demand for camps
- Successfully promoted the project by creating and customizing a website, and implementing word-of-mouth marketing through social media channels, resulting in the outreach to students from across the United States and surpassing the initial 35-person capacity limit
- Planned and designed engaging slideshows and at-home experiments conducive to online teaching, ensuring 100% attendance from all 35 students and fostering active participation and hands-on experiences during each lesson

NON-TECHNICAL SKILLS & INTERESTS

- **Interests:** Sketching, Watercolor, Indie Music, Chinese Culture!

IZAIAH ROBINSON

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EDUCATION

Dartmouth College – Hanover, NH

GPA: 3.3/4.0

B.A. in Government & Economics

Anticipated Graduation: May 2024

- **Accomplishments:** NCAA Division I Student-Athlete (Dartmouth Varsity Basketball Team); DBSAA Executive; SAAC Executive
- **Relevant Courses:** Development Economics, International Politics, Macroeconomics, The Price System
- **Industry Education:** Building a Financial Model, Core Data Analysis, Core Financial Concepts, Finance Interview Prep, Valuation 1: DCF

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design business presentations for Fortune 500 companies
- **Change Mgmt. Training:** applied an ADKAR assessment to help BofA employees implement new wellness program
- **Data Visualization:** created a 3-year roadmap to visualize the key steps needed to manage/maximize a \$450K budget
- **Financial Management:** managed a \$450k budget over 3 years for BofA, accounting for direct and indirect costs
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in sprints to coordinate project activities and track goals, milestones, and OKRs

EXPERIENCE

Wells Fargo – *Incoming Investment Banking Summer Analyst* | Charlotte, NC

06/2023 – 08/2023

- Expected to develop & maintain complex financial models, performing various financial analyses, including valuations and mergers
- Expected to conduct comprehensive company and industry research after participating in due diligence sessions with deal team members

Bank of America – *MAP Strategy & Management Student Consultant; Development Team Member (Monitor Phase)* | Remote

09/2022 – 11/2022

- Created a new skill-based campus wellness program to reduce mental health disparities for BIPOC students on college campuses by 25%+
- Owned the ‘monitor phase,’ managing a \$450k/3 yr. budget to drive \$1M+ positive revenue impact for BofA’s business team by 2025-26
- Created a multi-year strategy roadmap, utilizing a Gantt chart to visualize the key steps needed to manage/maximize the budget over 3 yrs.
- Designed a change mgmt. strategy to build Awareness/Desire/Knowledge/Ability/Reinforcement of the plan with BofA’s 200k+ employees

InvestWithScout – *Finance Intern* | San Francisco, CA

06/2022 – 08/2022

- Worked closely with the CFO to help manage the financials and operations of the company
- Met twice a week via Zoom working on valuation of competitors in the market, both private and public companies
- Researched and gather data needed for outreach to angel investors, venture capital firms, and funding projects
- Practiced and worked through the fundamentals of finance (financial statements, valuations, M&A transactions, etc)

Take-Off Institute – *Research Fellow* | Cambridge, MA

06/2021 – 08/2021

- Selected as 1 of 50 African American undergraduate students out of 500+ applicants to be a part of the Takeoff Fellows
- Worked closely with an advisor, conducting extensive research, and gathering information to complete & present a final presentation
- Met on a weekly basis via Zoom focusing on subjects including time management, healthy practices, leadership skills, and trust building

LEADERSHIP & SPECIAL ACTIVITIES

JP Morgan Chase & Co. – *MAP Early Education Series Participant* | Remote

11/2022 – Present

- Meet with different members of JPMC’s Commercial Banking team once a month to learn more about Commercial and Corporate Banking
- Participate in interactive educational experiences to learn more about JPMC’s history, commitment to DEI, and more (i.e., trivia night)
- Learn how the firm manages relationships across the firm/globally in accordance with Corporations, Financial Institutions & Public Sector

Make A Play Foundation (MAP) – *D-League Fellow '23; Team Captain* | Remote

09/2022 – Present

- Selected as one of only 32 captains to lead a cross-functional team of ~ ten student-athletes through a professional development fellowship
- Lead weekly all-hands meetings & manage a portfolio of complex initiatives required to consult five Fortune 500 companies within a year
- Analyze business challenges through systematic problem-solving frameworks (ADKAR, DMAIC, MECE, MEDDIC, PESTEL, SWOT)
- Receive specialized training through the Finance Track in: Core Financial Concepts, Finance Interview Prep, Valuation 1: DCF, and more

Dartmouth College Varsity Men’s Basketball Team – *NCAA Division I Student-Athlete* | Hanover, NH

09/2020 – Present

- Devote 25+ hours a week to: practice/training, film sessions, individual and team meetings, games, tutoring, travel, and community service
- Provide thoughtful leadership that is inclusive, transparent & empowering & supports the team’s goal to develop teammates on/off the field
- Develop a results-oriented focus & skills in: communication, critical thinking, accountability, resiliency, teamwork, and time management

Bank of America – *MAP Play-In Tournament Participant* | Remote

09/2022 – 11/2022

- Participate in an 8 week-long learning experience with BofA where scholars learned key financial concepts & their real-world applications
- Compete in a case competition with a team of six—tasked with creating a skill-based mental health program for BIPOC college students
- Shadow current professionals across multiple LOBs to learn more about careers in consulting, finance, operations, law, and technology

NON-TECHNICAL SKILLS & INTERESTS

- **Fun Fact:** I have a Yorkshire Terrier.
- **Interests:** Basketball, Sports, Reading, Cars.

JACQUELINE K. JASKIEWICZ

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EDUCATION

Georgetown University – Washington, DC

GPA: 3.6/4.0

B.A. in Finance | Minor in Anthropology | ACT: 31

Anticipated Graduation: May 2026

- Accomplishments: NCAA Division I Student-Athlete (Georgetown Women's Varsity Lacrosse); Florida High School Girls Lacrosse State Champion Lake; US Lacrosse Player of the Week 2022; US Lacrosse All-American 2022; Orlando Sentinel Player of the Year 2022
- Relevant Courses: Business Financial Management, Business Statistics, Financial Accounting, Managerial Accounting, Microeconomics
- Industry Education by Spring 2024: 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

EXPERIENCE

UBS – *Incoming Wealth Management Student Analyst* | New York, NY (Remote)

January 2024 – Present

- Expected to collaborate with a team of 6 to introduce a marketing strategy to UBS for Women's History Month in 2024, helping to scale women's control of the U.S. wealth market from \$10T in 2020 to \$30T by 2030 (~300%) & highlight women's collective spending power
- Expected to present a 12-page slide deck to UBS's Wealth Management Team in March, applying the Pyramid Principle to consolidate my team's slides into a cohesive document, ensuring we jointly present our top conclusions first, followed by supporting arguments/data/facts

Travistock Development Company – *Accounting and HR Intern* | Orlando, FL

June 2023 – August 2023

- Coordinated with a multi-personnel team to assist portfolio objects, collaborating and presenting to investors and executive for the firm
- Extracted and integrated data in an expansive excel framework to facilitate the management of several thousand assets during a system
- Utilized attention to detail to assist of Financial Accounting with federal documents, such as their 2022 Federal Tax Returns

ICON Park – *Concierge and Attraction Host* | Orlando, FL

June 2021 – August 2021

- Acted as an ambassador for guests, familiarizing them with the park and providing them with resources to enhance their experiences
- Handled transactions and operations for the organization, tracked capital expenditures and aided in monthly financial growth
- Operated attractions while demonstrating superior guest service and maintaining safety guidelines to ensure safety and satisfaction

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – *Women's Playmaker '23* | Remote

December 2023 – Present

- Selected as 1 of only 120 college women athletes to participate in a two-month fellowship to prepare for careers in competitive industries
- Receive 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
- Collaborate with a scrum team of 6 to develop a multi-year strategy for UBS's Women's History Month initiative with a 5-week timeline
 - Technical Skills Acquired: [Agile Project Management](#) | [Scrum Methodology](#) | [Tuckman's 5 Stages of Group Development](#)

Georgetown Entrepreneurship Club – *Member* | Washington, DC

September 2023 – Present

- Collaborate with fellow club members to organize and execute events, workshops, and guest speakers focused on entrepreneurial topics
- Network with opportunities with professionals, entrepreneurs, and alumni to create connections and gain insight into various industries
- Foster a collaborative environment within the club, encouraging the exchange of ideas and the growth of entrepreneurial skills

Georgetown University Women's Lacrosse – *NCAA D I Student-Athlete* | Washington, DC

August 2022 – Present

- Conduct personalized tours for prospective recruits, providing insights into the student-athlete experience, effectively communicating the balance between academic excellence and athletic commitment, contributing to increased recruitment success and program growth
- Initiate and lead film sessions with teammates to analyze game footage to identify areas for improvement, facilitating constructive discussions on strategy, individual performance, and teamwork, resulting in enhanced on-field cohesion and improved athletic performance
- Utilize exceptional time management skills by effectively balancing rigorous academic coursework with athletic commitments, maintaining a commitment to both academic excellence and athletic performance, resulting in a 3.6 GPA overall and a 3.9 GPA last semester

Georgetown Student Athlete Advisory Committee – *Student Advisor* | Washington, DC

August 2022 – Present

- Collaborate with fellow committee members to address issues related to student-athlete welfare, balancing academic and athletic responsibilities to promote student-athlete well-being through mental health awareness campaigns, workshops, and support programs
- Facilitate NCAA compliance discussions, ensuring that student-athletes were well-informed about rules and regulations

Annual McDonough School of Business Consulting Project – *Finalist* | Washington, DC

November 2022 – November 2022

- Conducted thorough research and analysis, contributing valuable insights to inform decision-making processes and final presentation
- Coordinated team discussions and brainstorming sessions to generate innovative ideas and strategies, leading to an innovative solution that allowed the team to advance through 3 rounds of intense presentations amongst a competition of 50+ teams

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Finance, Statistics, Traveling, Reading, Tennis, Volunteering, Watersports, and Baking!

JAMES M. MCCAULEY

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EDUCATION

Columbia University – New York City, NY **GPA: 3.7/4.0**
B.A. in Economics | Minor in Classics | SAT: 1400 Anticipated Graduation: Spring 2026

- Accomplishments: NCAA Division I Student-Athlete (Football)
- Relevant Courses: Principles of Econ, Macro Economics, Calc I, Calc III, Statistics
- Wall Street Prep Education by 2024: Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

EXPERIENCE

AS Birch Grove – *Summer Analyst* | New York City, NY **06/2023 – 08/2023**

- Developed a unique outlook across private & public markets and differentiated investment access and capital markets execution

Morgan Stanley – *Student Analyst; Investments (Team George E. Johnson)* | Remote **04/2023 – 06/2023**

- Selected to participate in an invite-only case competition with Morgan Stanley's Fixed Income Division, developing an investment thesis for MD, Stephen Dance, to recommend an asset (Global/Base Metal Mutual Fund) to one of MS's clients through the end of '23
- Transformed my team's recommendation report into a principled investment strategy, creating a checklist of 5+ "yes or no questions" to provide MS with a holistic view of our asset & each of its moving parts, also serving as a summary of our personal investment process
- Produced a 2-page written investment thesis outlining why our asset would generate an attractive return for MS, analyzing 4 steps: (1) underlying catalyst(s); (2) position within catalyst(s); (3) risk/reward profile; and (4) expected return(s) & conviction level (low/mid/high)
- Updated and actively monitored the team's project management workflow on Air Table, "owning" the execution phase of the project, streamlining the process of achieving goals by completing all deliverables 4 weeks ahead of schedule (analysis, recommendation report)

Income & Asset Advisory – *Intern Analyst* | Armonk, NY **06/2022 – 08/2022**

- Executed day-to-day tasks with Investment Manager, compiled research on equities, spoke directly with clients, and interpreted the performance of funds, equities, and managers
- Examined the performance of large-cap equity funds of up to 15 million assets through Excel to further evaluate big tech and value stocks
- Informed clients on relationship between fiscal policy and the reaction of large-cap value funds gaining understanding of what factors influence the market's positive response to changes in the regulatory environment

McCauley Tutoring Academy – *Founder & Tutor* | New York City, NY **03/2020 – 08/2023**

- Created tutoring business for underserved and low-income students, resulting in clients attaining a passing grade in all final examinations
- Enhanced each client's grade in their respective class by an average of 15% in each class, demonstrating improvement in retention
- Led 25% of client base to become first time Honor Roll recipients in their respective schools

LEADERSHIP & COMMUNITY DEVELOPMENT

Columbia University Football – NCAA Division I Student-Athlete | New York City, NY **08/2022 – Present**

- Collaborate with 100+ diverse teammates, allowing enhanced communication and fostered the ability to work on a team effectively
- Maintain a 3.7 GPA while engaging in 30+ hours weekly of practice, film, training, and analyzing scouting reports the entire semester
- Coordinate weekly calls with offensive freshman players, reviewing signals and areas for improvement, allowing the entire group to swiftly gain a solid grasp on the complex offense and grow much closer off the field as well

Providing P.R.O.O.F – Board Member | Westchester, NY **06/2022 – Present**

- Aid in the supervision of a non-profit organization dedicated to improving financial literacy among students from low-income backgrounds to help bridge the economic inequality gap
- Brainstorm plans for classes on subjects regarding value systems and disrupting economic habits to help improve personal habits and value systems to allow education to implement sustainable change within each individual
- Recommend ideas and up-to-date methods regarding how to effectively reach out and connect with black/brown youth in underserved communities to realize change through the organization and leave a stable, lasting impact

Harlem Jets Organization – Member | Harlem, NY **03/2019 – Present**

- Head 10u football team throughout the spring conditioning and practices, winning all 4 scrimmages against opponents and connecting kids with learning disabilities
- Supervise 9u and 10u teams while on away game trips on overnight trips in different states, resulting in both teams becoming successful in their respective away games with perfect conduct and behavior on trips
- Coordinate study hall sessions with kids after Saturday practices, where players received both physical and intellectual stimulation/practice every Saturday

Make A Play Foundation (MAP) – Morgan Stanley 'Skills Challenge' Mentee | Remote **4/2023 – 06/2023**

- Selected as 1 of 150 first-year athletes to participate in an eight-week fellowship designed to hone technical skills for a career in finance
- Received 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for finance roles
- Collaborated with a 5-person scrum team & Morgan Stanley mentor to deliver an investment thesis to the bank's Fixed Income Division
 - Technical Skills Acquired: [Agile Project Management](#) | [Scrum Methodology](#) | [Tuckman's 5 Stages of Group Development](#)

About U NYC – Coach, Teacher and Mentor | New York City, NY **05/2019 – 08/2023**

- Coached underserved youth football players to increase athletic skill through field workouts, weight training, and conditioning
- Planned weekly academic lessons and exercises, fostering a significant increase in academic performance in all basic academic fields
- Tutored 8th and high schoolers for standardized exams (TACHS and SAT), resulting in new SAT super scores and acceptances into at least 2 private schools due to performance on TACHS exam

NON-TECHNICAL SKILLS & INTERESTS

- Interests: The Classics, Chess, Reading, Tutoring, Entrepreneurship (Founded my own tutoring company during the Pandemic).

JAMIE H. KIM

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EDUCATION

Yale University – New Haven, CT

GPA: 3.77/4.0

B.A. in Economics | SAT: 1340 | ACT: 32

Anticipated Graduation: May 2025

- Accomplishments: NCAA Division I Student-Athlete (Yale Women's Tennis); Special Contribution Award; Earned 5-Star Tennis Rating
- Relevant Courses: Accounting, Intermediate Macroeconomics, Intermediate Microeconomics, Intro. Macroeconomics & Microeconomics
- Industry Education: Building a Financial Model, Core Data Analysis, Core Financial Concepts, Finance Interview Prep, Valuation 1: DCF
- Leadership Events: Participated in Leadership Events with Bank of America, Deloitte, Evercore, Oliver Wyman & JP Morgan Chase & Co.

EXPERIENCE

DICK'S Sporting Goods – *Financial Student Consultant* | Remote

01/2023 – 03/2023

- Designed a national marketing campaign to promote DSG's products to 100K+ new female customers for Women's History Month in 2023
- Owned the 'monitor phase,' managing a \$3.5M budget & allocating funds for direct (5+ quality creative assets) & indirect costs (personnel)
- Provided a financial algorithm to make the plan profitable & help DSG raise \$4B in total Q1 net sales/increase net sales by 6-8% from '22
- Led benchmark analysis to compare spend rationalization against 3 DSG female-focused initiatives:
 - **Good Sports**: audited a \$100k grant by DSG to distribute sports bras to under-resourced female athletes across the U.S. in 2021
 - **U.S. Girls Running Programs**: audited a \$500k grant by DSG to support under-resourced girls' running programs in 2021
 - **U.S. Soccer Foundation**: audited a \$5M/3 yr. grant by DSG to support the Foundation's 'United for Girls' initiative in 2020

Samlyn Capital – *Summer Research Intern* | New York, NY

05/2022 – 06/2022

- Explored the different sectors of the finance industry through regular meetings with current employees/stakeholders at the firm, providing the opportunity to learn more about what the finance industry entails + the different career paths that are available to early professionals
- Presented weekly stock research findings with corresponding sector heads, implementing the team's research strategy into the final stock presentation to the CEO, learning how to deliver executive presentations by summarizing upfront and providing actionable information
- Investigated different companies in different sectors, such as consumers, financials, and healthcare, learning more about the different strategies companies implement within these different sectors & developing a more holistic view of the financial services industry

Cincinnati Tennis & Education Center – *Lead Community Coach* | Cincinnati, OH

05/2021 – 08/2021

- Mentored children between the ages 5 and 12, providing educational and mentor support both on and off the tennis court, resulting in not only successful players but successful young adults with enhanced clarity on setting goals, developing contacts, and identifying resources
- Merged character building opportunities through sports-based youth development for children with disabilities, allowing for a wider range of children to have access to the sport of tennis & helping to attract, engage, and retain an under-resourced population interested in tennis
- Educated children and maintained engagement on and off the court, creating a fun and inclusive environment for them to explore interests

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – *Women's Playmaker '23* (Team Flo Hyman) | Remote

12/2023 – Present

- Selected as 1 of only 120 college women athletes to participate in a two-month fellowship to prepare for careers in competitive industries
- Analyze business challenges through systematic problem-solving frameworks (ADKAR, DMAIC, MECE, MEDDIC, PESTEL, SWOT)
- Manage a portfolio of complex initiatives required to consult several Fortune 500 companies with a cross-functional case team of 6 athletes
- Collaborated with a scrum team of 5 to develop a multi-year strategy for DSG's Women's History Month initiative with a 5-week timeline
 - Technical Skills Acquired: [Agile Project Management](#) | [Scrum Methodology](#) | [Tuckman's 5 Stages of Group Development](#)

Yale Women's Tennis Team – *NCAA Division I Student-Athlete* | New Haven, CT

08/2021 – Present

- Recruited to represent the Women's Tennis Team on SAAC, gaining a unanimous vote from the team to advocate for player health & safety
- Shaped the team culture by giving 100% effort every day during practice and received the 'special contribution' award by the Head Coach
- Balanced a full academic course load with approximately 30 hours per week committed to practice, competition, travel, and meetings, improving cumulative GPA each semester after learning how to manage time, prioritize tasks & actively communicate with professors

Yale Student-Athlete Advisory Committee – *Team Representative* | New Haven, CT

05/2021 – Present

- Campaigned as the Women's tennis team representative for "SAAC" for four semesters, receiving a unanimous vote from teammates to attend bi-weekly meetings with athletes from other schools/sports & provide input on rules, regulations & policies affecting all athletes
- Contributed to implementing initiatives that support the physical and mental well-being of all student-athletes on campus, and proposed a new set of innovative rules and regulations to the NCAA that should be implemented by all schools/athletic departments in D1 athletics
- Coordinated the "Bulldog Cup Challenge," a fun competition between the various sports teams at Yale, designed to increase student-athlete participation on campus, creating friendly competition among varsity teams & building a community of like-minded peers

Matthew 25: Ministries – *Volunteer* | Cincinnati, OH

06/2019 – 05/2020

- Volunteered 2 hours every week to count, sort, package, and ultimately prepare donated goods to be shipped to various parts of the world
- Communicated with other volunteers regarding the task at hand to work efficiently & quickly, thereby streamlining communication efforts
- Delegated different roles to specific volunteers based on their skills and interests, increasing productivity, and ensuring each volunteer felt empowered to thrive in their role

JEDIN J. TRUONG

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EDUCATION

University of California Berkeley, Haas School of Business – Berkeley, CA

Expected Graduation: 2026

B.S. Business Administration, B.A. Data Science

- Accomplishments: NCAA Division I Student-Athlete, Pac-12 Champion, National Champion
- Relevant Courses: Statistics and Probability, Data Science, Economics, Principles of Business, Calculus, Computer Science

London School of Economics and Public Policy – London, UK

Summer 2024

- Relevant Courses: Computational Methods for Financial Mathematics, Econometrics, Political Economy of Public Policy

EXPERIENCE

Valley Consulting Group – Project Leader | Berkeley, CA

08/2023 – Present

- Consultant for Berkeley's premiere tech-consulting group (<https://vcg.berkeley.edu>) working with Fortune 500's and industry-leading tech companies. Past clients include Google, Microsoft, Youtube, Costco, Spotify, Disney, Nike, LinkedIn, Airbnb, and Roku.
- Developed a go-to-market strategy for Notion in Fall 2023. Conducted market research and presented final deliverable to CPO and Founder
- Appointed as a Project Leader for Fall 2024. Currently sourcing for potential clients.

Google – Finalist | Haas Business School Association Case Competition

04/2024

- Created an investment recommendation via market research and financial analysis in 48 hours, presented to a Google program manager.
- https://docs.google.com/presentation/d/1TPMGH3kCVUXRc_NnXswmU1a0vEOU63HsqRqaMsJ1Uqs/edit?usp=sharing

Nike – Team Leader | Student Athlete Business Network Case Competition

03/2024

- Led 5 Student Athletes in their first case competition through competitive analysis, decking, and presenting a marketing campaign.

PWC – Team Leader | PWC Case Competition

09/2023

- Led a team of 3 in recommending initiatives to boost employee morale post-layoffs at hypothetical company Z-Comm, presented to judges.
- <https://drive.google.com/file/d/16zs7iwZtjnxhx6RIz-wSxZ5CBVPb2H3O/view?usp=sharing>

CitiesGPS – Summer Data Analyst | Washington D.C/Remote

06/2023 – 08/2023

- Researched alongside the Brookings Institution analyzing public data packages using 'R' to determine economic growth opportunities in California 'UPLIFT' and Sacramento regions. Analysis included: industry similarities, occupation similarities, transferable labor skills.
- Utilized powerpoint softwares like 'Canva' to format engaging and informative deliverables to drive informed decision-making.
 - Skills Practiced: R, Python, Rstudio, Canva, Flourish

Morgan Stanley – Student Analyst; Scrum Master | Remote

04/2023 – 06/2023

- Selected to participate in an invite-only case competition with Morgan Stanley's Fixed Income Division.
- Developed a 2-page written project charter with a schedule of tasks to guide my scrum team of 5 within a 5-week deadline.
- Approved and presented a final 12-page slide deck, recommending the best asset class to invest in through the end of 2023.

Industry Dive – Sales and Business Development Intern | Washington D.C.

06/2022 – 08/2022

- Pitched Industry Dive's content marketing services, StudioID, to previous clients, shifting them from newsletter advertising to digital content, and developing recommendations for content marketing product services through 250+ unique sales emails
- Compiled a unique list of contacts from Industry Dive's previous relations with companies into Salesforce CRM database, prospecting 500+ new contacts in marketing, growth, and lead generation using Salesforce and SalesNavigator
- Analyzed previous clients' digital content maturity by assessing their websites and scoring them on a scale of 0-5, reporting an assessment of over 35 companies and recommended best products and services to sales associates and managers

LEADERSHIP & COMMUNITY DEVELOPMENT

UC Berkeley Men's Rowing – NCAA Division I Student-Athlete | Berkeley, CA

08/2022 – Present

- Execute race plans and enact coach's goals for the team during daily trainings and seasonal competitions, practicing 30 hours a week in preparation for Division I competition as defending National Champions and Pac-12 Conference Champions.
- Identify and resolve conflicts among rotating team members in a daily boat setting, optimizing boat performance
- Provide coaches with individualized progress reports and recommendations to optimize training plans for 67 competing athletes across 7 racing boats assisting the team in achieving first place in almost every race throughout the season

Student Athlete Business Network (SABN) - President | Berkeley, CA

06/2023 - Present

- Connecting current Cal Student Athletes with industry professionals and career opportunities to bridge the gap between their dedication to athletics and their career aspirations in business. 21 varsity teams represented in SABN's active membership.
 - Opportunities include: Guest Speaker Series, Resume/Career Workshops, Networking Events, Case Competitions

Make A Play Foundation (MAP) – Morgan Stanley 'Skills Challenge' Mentee | Remote

04/2023 – 06/2023

- Received 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for finance roles
- Collaborated with a 4-person scrum team & Morgan Stanley mentor to deliver an investment thesis to the bank's Fixed Income Division
 - Technical Skills Acquired: Agile Project Management | Scrum Methodology | Public Speaking

STEM to Stern – Volunteer Assistant | Oakland, CA

08/2022 – 12/2022

- Introduced the sport of rowing to students from underrepresented demographics to empower them athletes; of 40 students within the STEM to Stern program, more than 25+ moved onto higher level programs with Oakland Strokes Rowing Team
- Coached rowing to students from Oakland Elementary and Middle schools, leading two three-hour practice sessions per week
- Mentored students in the STEM to Stern program by sharing my experiences as a Division I Student Athlete and advising students on how to approach their futures both athletically and academically. Instilled new ideas and aspirations to the future generation

SKILLS & INTERESTS

- Skills: Korean (proficient), Spanish (limited), CRM/Salesforce, Spreadsheets, Python, R, SQL, Java
- Interests: Pickleball, Golf, Fashion, Content Creating, Traveling | Fun Fact: My name is from Star Wars!

JONATHAN K. SADDLER

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EDUCATION

Georgetown University | McDonough School of Business – Washington, DC

GPA: 3.9/4.0

B.A. in Business Management and Marketing

Anticipated Graduation: May 2023

- **Accomplishments:** NCAA Division I Student-Athlete (Georgetown University Football Team); Wall Street Alliance Scholarship Recipient; First-Generation College Student; Eric Tutera Sports Leadership Award/Scholarship; PWC Smart Program Mentee; All-Academic Team; Microsoft SLT Executive Leadership Workshop; Project Focus Mentor; Incoming Make A Play Foundation D-League Head Coach (22-23)
- **Relevant Courses:** Business Marketing, Data Analytics, Financial Accounting, Financial Models, Macroeconomics, Managerial Accounting
- **Industry Education:** Creating Business Presentations 101, Intro to: Inclusion, Innovation & Impact, Operations, and Sales & Marketing

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design business presentations for Fortune 500 companies
- **HubSpot Inbound Marketing:** used Inbound Marketing fundamentals to create a DEI strategy for a startup
- **IC Agile Training:** used agile fundamentals to lead a scrum team of ~10 using the cloud service, Air Table
- **Lean Six Sigma Training:** used lean six sigma's DMAIC framework to perform a current state analysis of BWPC
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in sprints to coordinate project activities and track goals, milestones, and OKRs

EXPERIENCE

JP Morgan Chase & Co. – *Incoming MMBSI Summer Analyst* | Washington, DC

06/2022 – 08/2022

- Expected to work with mid-sized companies, municipalities, and not-for-profit entities across Healthcare, Higher Ed., Life Science & Tech
- Expected to work with bankers/product partners to provide a range of financing solutions & strategic advice for clients in diverse industries
- Expected to champion a culture of innovation and a customer centric mindset by staying up-to-date with industry trends and developments

UBS Group AG (UBS) – *Inclusion, Innovation & Impact Student Analyst* | Remote

02/2022 – 04/2022

- Created a business plan for a non-profit org. committed to uplifting the community and driving a more equitable economy through UBS
- Developed an executive summary, business description, market analysis, marketing & sales plan, operating plan, and financial projections
- Collected data & insights that helped inform and advance policy solutions that support the path towards racial and gender equity in the U.S.
- Pitched to representatives at UBS & PlayersTV leveraging Pyramid principles to subdivide the PowerPoint presentation into small buckets

DICK'S Sporting Goods – *Sales & Marketing Student Consultant* | Remote

12/2021 – 02/2022

- Created a B2C marketing campaign to promote DSG's products to female consumers and expand the company's female-focused initiatives
- Introduced several marketing initiatives (product assortment, in-store programs, donations) to expand women's offerings in-store and online
- Customized brand messages, sales product strategies, timelines, and engagement rate benchmarks to align with DSG's wholesale campaign
- Qualified future sales opportunities using the MEDDIC framework to understand each phase of the prospective buyer's purchasing process

Black Women's Player Collective (BWPC) – *Growth & Operations Student Consultant* | Remote

08/2021 – 10/2021

- Created a 5-year strategic roadmap for the Executive Director of the BWPC to enhance the organization's structure and operating course
- Analyzed current practices through McKinsey's 7-S model to recommend ways BWPC can increase access to soccer for URM's in the U.S.
- Outlined the long-term vision needed to achieve the strategy by establishing S.M.A.R.T. goals to provide clarity for each year of the plan
- Designed a change management strategy to institutionalize the goals of the 5-year plan, using the "ADKAR" model for business change

Heineken USA – *Marketing Intern* | New York, NY

06/2021 – 08/2021

- Managed a portfolio of cross-departmental projects and supported leaders across the organization with business analysis/insights discovery
- Communicated results, blueprint priorities, programs, and weekly/monthly initiatives to the commercial manager and wholesaler teams
- Developed a functional understanding of Heineken's commercial routine by learning about its overall strategy and core business practices

Arctos Sports Partners – *Private Equity Student Analyst* | Remote

06/2021 – 08/2021

- Presented a buy, sell, hold recommendation, and price target for Madison Square Garden Sports (NYSE: MSGS) to Arctos' leadership team
- Conducted a creative & resourceful due diligence process that included researching SEC filings, investor presentations and industry reports
- Created a PowerPoint presentation that included an investment thesis, business model, industry overview, valuation & growth opportunities
- Leveraged Microsoft Excel to create summary tabs of: income statements/balance sheets, financial projections, and valuation calculations

ColorVizion Lab – *Strategy & Analytics Student Consultant; Scrum Master* | Remote

05/2021 – 07/2021

- Developed a diversity recruitment strategy for an executive recruiting firm looking to attract, engage & retain diverse undergraduate talent
- Implemented HubSpot Inbound Marketing tools to build inclusion into the corporate infrastructure & create high retention levels for talent
- Developed key performance indicators (i.e., absenteeism rates, employee turnover rates, talent satisfaction) to measure HR performance
- Presented to ColorVizion Lab's leadership team leveraging Pyramid principles to subdivide the PowerPoint presentation into small buckets

Brain & Spine Surgeons of New York Consulting – *Co-Director of IT Department* | Stamford, CT

01/2020 – 01/2021

- Oversaw the infrastructure of technical operations, managed a team of IT employees & tracked technology to reach targeted business goals
- Eliminate security risks, and increased user satisfaction across multiple verticals to help the company achieve optimum efficiency
- Created Excel pivot tables to compile key company data and reports and keep track of expenses and revenues of the company

LEADERSHIP & SPECIAL ACTIVITIES

Make A Play Foundation (MAP) – D-League Fellow; Captain (Team Curveball)

03/2021 – 04/2022

- Selected as one of only 20 captains to lead a cross-functional team of ~10 student-athletes through a professional development fellowship
- Led weekly all-hands meetings & managed a portfolio of complex initiatives required to consult 5 Fortune 500 companies within a year
- Analyzed business challenges through systematic problem-solving frameworks (ADKAR, DMAIC, MECE, MEDDIC, PESTEL, SWOT)

JOSHUA S. WOLFSON

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EDUCATION

Dartmouth College – Hanover, NH

GPA: 3.92/4.0

B.A. in Economics and Computer Science | ACT: 34

Anticipated Graduation: May 2026

- Accomplishments: NCAA Division I Student-Athlete (Varsity Swimming & Diving)
- Relevant Courses: Econ 1 The Price System, Econ 26 Intermediaries and Markets, Econ 28 Public Finance and Policy, Math 10 Elementary Statistics, ENV5 80.08 Science Policy & Diplomacy
- Industry Education by Winter 2024: 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

EXPERIENCE

JP Morgan Chase & Co. – Office of LGBTQ+ Affairs Finance Student Analyst | Remote

October 2023 – November 2023

- Led the “control phase” of a 5-week project for JP Morgan Chase’s Office of LGBTQ+ Affairs, collaborating with a team of 6 to develop a new fellowship for the bank that attracts top talent from the LGBTQ+ undergraduate community, leveraging a \$5M budget in 5 weeks
- Managed a team of individuals in a high-stakes finance competition, demonstrating strong leadership skills and the ability to motivate team members to perform at their best, collaborating to submit a 12-slide PowerPoint to JPMC’s leadership team to formally close the project
- Oversaw a \$5M budget over three years that outlined all the costs associated with launching our fellowship, implementing S.M.A.R.T. tools to transform our strategy into a concrete roadmap & supplementing it with a KPI framework to organize our business goals/objectives
- Identified opportunities for cost savings by performing a benchmarking analysis against 3 of JP Morgan’s similarly situated initiatives (Advancing Black Pathways, Advancing Hispanics & Latinos, and Winning Women) to compare spend rationalization & optimize the \$5M
- Coordinated weekly team meetings, building out a schedule through our project management workflow on Air Table to streamline the process of achieving our goals, completing all 3 of my deliverables 2 weeks ahead of schedule (i.e., budget, KPI framework, PMP update)

Lockheed Martin – Venture Capital Intern | Bethesda, MD

June 2023 – August 2023

- Coordinated research effort for flow battery technology, developing a DCF model to recommend an additional \$500M investment
- Streamlined partnership to determine ownership of PSaaS product with approximately \$100M NPV based on discounted cash flow analysis
- Oversaw analysis of the additive manufacturing landscape and prioritized opportunities

Lionchase North America – Summer Analyst | Washington, DC

June 2022 – August 2022

- Managed the restructuring of Healthmetryx, a leveraged buyout in the respiratory medical device industry, using company forecasts, comparable companies analysis, and discounted cash flow analysis
- Cultivated an early-stage M&A plan for supply-chain portfolio companies
- Led the modeling of Healthmetryx’s data in Tableau, resulting in a more streamlined approach to data collection

LEADERSHIP & COMMUNITY DEVELOPMENT

Warburg Pincus – MAP Elite 100 Investment Fellow | Remote

November 2023 – Present

- Selected as 1 of 100 second-year athletes to participate in a five-part fellowship designed to prepare BIPOC students for careers in banking
- Receive 20+ hours of virtual instruction in accounting, technical interview preparation & industry-specific training for future banking roles
- Collaborate with 5 athletes + 1 IB head coach to prepare a final buy/sell/hold recommendation & price target to Warburg’s leadership team

Dartmouth Varsity Swimming – NCAA Division I Student-Athlete | Hanover, NH

September 2022 – Present

- Organized practices during voluntary hours to maintain athletes’ fitness, leading to the team’s strong performance at Ivy championships, including top times achieved, with personal accomplishments of a top 4 and top 10 time in 200M and 100 Breaststroke
- Mentored seven incoming freshmen on effective time management in the pool, contributing to a more positive team dynamic and nearly 100% voluntary practice attendance
- Coordinate extracurricular activities for the team to enhance the team dynamic and create a more welcoming environment, resulting in minimal complaints to coaches and a smooth transition to a new coach

Make A Play Foundation (MAP) – D-League Fellow ’23 (Fall Cohort | Team Curveball) | Remote

September 2023 – November 2023

- Selected as 1 of 250 college athletes to participate in a fellowship designed to prepare underrepresented athletes for professional success
- Received 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
- Collaborated with a team of 4 to develop a strategy for JPMC’s Office of LGBTQ+ Affairs that promotes inclusion for LGBTQ+ students
 - Technical Skills Acquired: [Agile Project Management](#) | [Scrum Methodology](#) | [Tuckman’s 5 Stages of Group Development](#)

Teens Helping Seniors – Volunteer | Potomac, MD

August 2020 – September 2022

- Managed medicine drop-offs to immunocompromised individuals, resulting in over 250 volunteers facilitating more than 1,000 deliveries
- Conducted deliveries of essential medicines and groceries to immunocompromised individuals during the COVID-19 pandemic
- Mentored local volunteers on coordinating deliveries with community members, leading to a significant volunteer force of 250+ volunteers

IPaws – Co-Founder | Potomac, MD

June 2018 – September 2022

- Maintained a log of all local businesses with surplus towels and nearby shelters, leading to the donation of 100+ rags to animal shelters
- Collaborated with local businesses to acquire their old rags and towels, reducing waste and providing free donations to animal shelters
- Revamped the organizational system for storing and delivering towels to animal shelters, leading to more streamlined deliveries in less time

The Foodanator – Developer | Potomac, MD

Mach 2022 – May 2022

- Integrated the spoonacular API and essential Python modules required to utilize it, resulting in a functional backend for my project
- Handled HTML frontend elements for visual impact and utilized JavaScript to create an interactive frontend
- Improved my proficiency and confidence in creating full-stack projects with Flask, leading to more efficient future projects

NON-TECHNICAL SKILLS & INTERESTS

- Interests: MMA, Altered Carbon, Programming, Poker, Collecting Hot Sauce (I have a hot sauce collection)!

JUSTIN LIU

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EDUCATION

Harvard University – Cambridge, MA

GPA: 3.8/4.0

B.A. in Computer Science | Minor in Economics | ACT: 36

Anticipated Graduation: May 2025

- Accomplishments: NCAA Division I Student-Athlete
- Relevant Courses: Introduction to Computer Science, Abstraction and Design in Computation, Data Science 1, Machine Learning
- Industry Education by Summer '23: 5 Phases of Project Management; Creating Business Presentations 101; Scrum Methodology

EXPERIENCE

Deloitte – *Business Tech Solutions Student Consultant* | Remote

07/2023 – Present

- Created a user journey map that diagrammed the path a prototypical WNBA fan would take when interacting with my team's new strategy to enhance Deloitte's WNBA Changemaker partnership, illustrating their initial point of contact → engagement → final action on one slide
- Designed and submitted a final 12-page slide deck + a single master document outlining the materials produced by the project and how they have been organized to Deloitte's leadership team, formally closing the project & transferring all materials/solutions to the client
- Updated and actively monitored the team's project management workflow on Air Table, "owning" the closure phase of the project, streamlining the process of achieving goals by completing all deliverables 2 weeks ahead of schedule (i.e., user journey map, PowerPoint)

Atomic – *Software Engineer Intern* | Cambridge, MA

05/2023 – 06/2023

- Developed mobile app from scratch using Flutterflow and Dart, offering comprehensive financial management tools to assist employees in effectively managing their finances
- Engaged in productive discussions with co-founders regarding the app's development progress, actively sharing suggestions for enhancing various aspects of the app while also incorporating valuable insights from their perspectives
- Enhanced the user interface elements of the app through iterative testing on multiple devices, resulting in a more user-friendly and intuitively navigable app design

Harvard Academic Resource Center – *Peer Tutor* | Cambridge, MA

09/2022 – 06/2023

- Provided peer tutoring services in computer science, math, and economics, assisting fellow students in reviewing class material and addressing additional questions related to various concepts
- Documented students' progress and lesson details in feedback forms to track improvement and effectively communicate the content of each lesson to the supervisor
- Promoted the development of healthier study habits among students, empowering them to effectively prepare for homework assignments and excel in exams through improved study techniques

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – D-League Fellow '23 (Summer Cohort) | Remote

06/2023 – Present

- Selected as 1 of 100 college athletes to participate in a fellowship designed to prepare underrepresented athletes for professional success
- Received 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles

Asian American Brotherhood – Member | Cambridge, MA

02/2023 – Present

- Explore opportunities to advocate both for the Asian American community/other marginalized communities by organizing activism events
- Participate in weekly member check-ins, prioritizing the well-being of all members and providing a platform to address any concerns or issues that may arise
- Volunteer in community service events within the local Cambridge area, actively participating in initiatives such as a homeless kitchen or park cleanup event, aimed at making a positive impact on the community

Harvard Data Analytics – Data Analyst | Cambridge, MA

09/2022 – Present

- Provided consulting services to a paying client, utilizing pricing data from competitors to assist them in determining optimal pricing strategies for their hardware store goods
- Actively participate in weekly team meetings, engaging in discussions regarding case logistics and effectively delegating assignments among team member
- Leveraged Python packages such as NumPy and Pandas to analyze datasets provided by the client and developed machine learning models to extract valuable insights and patterns

Harvard Fencing Team – Captain | Cambridge, MA

05/2022 – Present

- Dedicate 15 hours per week to rigorous training activities such as drills, fencing, lifting, and video analysis, resulting in the team's victory at the Ivy League Championships
- Facilitate effective communication between coaches and the team, serving as a liaison to discuss and address needs and goals, while also assisting with weekly scheduling to ensure smooth coordination between all parties involved
- Foster a cohesive team culture by facilitating open and constructive discussions, encouraging a close-knit environment, and setting ambitious yet attainable goals for the team

Leverett House Committee – Formal Chair | Cambridge, MA

09/2022 – 05/2023

- Efficiently managed logistics for formal events accommodating approximately 500 students, including coordinating transportation, catering, music, and venue arrangements
- Oversaw financial management and budgeting for organizing formal events and social gatherings, fostering a vibrant community within Leverett House of Harvard by facilitating lively and engaging experiences
- Collaborated with fellow members of the Leverett House Committee and other house committees to facilitate inclusive social events and sustain cherished traditions

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Photography, poker, golf, pool, traveling, and trying new cuisines.

KAMPTON KAM

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EDUCATION

University of Pennsylvania, Wharton School – Philadelphia, PA

GPA: 3.8/4.0

B.S. in Finance and Business Analytics

Anticipated Graduation: May 2026

- **Accomplishments:** NCAA Division I Student-Athlete (Track & Field); [2018 Youth Olympian Finalist](#); #1 High Jumper in the Nation (2018-Present); National Champion 2022 (High Jump); Singapore Open 2022 Champion (High Jump); Southeast Asian Youth Champion 2018 (High Jump); 2019 Southeast Asian Games Finalist, Philippines; World Athletics U18 Ranking (2018); World Athletics U20 Ranking
- **Relevant Courses:** Accounting & Financial Reporting; Corporate Finance; Operations, Information & Decisions; Statistics & Data Science
- **Industry Education by Winter 2024:** 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

EXPERIENCE

JP Morgan Chase & Co. – Office of LGBTQ+ Affairs Finance Student Analyst | Remote

October 2023 – November 2023

- Led and managed the "control phase" of a 5-week project for JP Morgan Chase's Office of LGBTQ+ Affairs, working with a team of 6 others to develop a new financial initiative to empower LGBTQ+ undergraduate students by managing a \$5M budget over a 3-year span
- Identified opportunities for increased financial literacy in LGBTQ+ communities by conducting research against similar JPMC initiatives (Advancing Black Pathways, Advancing Hispanics & Latinos & Winning Women) to generate a reasonable budget that optimized the \$5M
- Customized a KPI framework that identified concrete goals, objectives, goals, and key performance indicators to measure the completion of the project and provide J.P Morgan stakeholders with a clear and concise opportunity to understand the value of our work
- Consolidated resources that were utilized in previous representation initiatives to understand market trends in an ever-growing financial space and how to appropriately implement our new program for LGBTQ+ students interested in finance to gain the most traction
- Updated and actively monitored the team's project management workflow on Air Table, "owning" the control phase of the project, streamlining the process of achieving goals by completing all deliverables 1 week ahead of schedule (i.e., 3-year budget, KPI framework)

Quest Ventures – Summer Analyst | Singapore

June 2023 – August 2023

- Collaborated with senior analysts and partners on investment memos, pitch decks, and presentations for four potential portfolio companies
- Sustained clear and concise communication channels between commanders of four companies, ensuring effective information flow among superiors, subordinates, and external stakeholders to facilitate 24/7 operations
- Initiated the establishment of an Education Fund, raising \$80k to support philanthropic projects, scholarships & facilities for 3 high schools

Republic of Singapore Air Force – Company Quartermaster Sergeant | Singapore

January 2020 – November 2021

- Sustained clear and concise communication channels between commanders of four companies, ensuring effective information flow among superiors, subordinates, and external stakeholders to facilitate 24/7 operations
- Received the "Outstanding Airman of the Month" award for leading 15 airmen in executing critical COVID-19 operations within tight timelines and high-pressure situations
- Mentored an understudy to assume a future leadership position within two months, and developed a handbook to support future generations of sergeants in the company

LEADERSHIP & COMMUNITY DEVELOPMENT

Follow Through – Athlete Leader | Philadelphia, PA

January 2023 – Present

- Develop subject matter expertise in creating equitable opportunities for college students
- Created a petition advocating for more equitable policies to support student-athletes, garnering over 160 signatures
- Provide guidance to the leadership team on expanding the organization's impact, drawing insights from the pilot program

University of Pennsylvania Track & Field – NCAA Division I Student-Athlete | Philadelphia, PA

August 2022 – Present

- Devote 25+ hours a week to: practice/training, film sessions, individual and team meetings, games, tutoring, travel, and community service
- Provide thoughtful leadership that is inclusive, transparent & empowering & supports the team's goal to develop teammates on/off the field
- Develop a results-oriented focus & skills in: communication, critical thinking, accountability, resiliency, teamwork, and time management

Singapore National Olympic Council – Executive Committee | Singapore

August 2022 – Present

- Represent all 64 National Sporting Associations in Singapore, with a focus on Athlete Career Transition, Education, and Policies
- Collaborate with the International Olympic Council to promote the values of Olympianism, sporting excellence, and fair play in Asia
- Initiated four engagement sessions for 70 national athletes to learn and discuss relevant topics, including student-athlete life

Make A Play Foundation (MAP) – D-League Fellow '23 (Fall Cohort | Team Fast Break) | Remote

September 2023 – November 2023

- Selected as 1 of 250 college athletes to participate in a fellowship designed to prepare underrepresented athletes for professional success
- Received 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
- Collaborated with a team of 4 to develop a strategy for JPMC's Office of LGBTQ+ Affairs that promotes inclusion for LGBTQ+ students
 - Technical Skills Acquired: [Agile Project Management](#) | [Scrum Methodology](#) | [Tuckman's 5 Stages of Group Development](#)

NON-TECHNICAL SKILLS & INTERESTS

- **Interests:** Camping, College Football, Hiking, Ice Skating, NIL deals, Soccer, Spike ball, Watches, Red bull Sports.

KATIE A. POU

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EDUCATION

University of Pennsylvania – Philadelphia, PA

GPA: 3.1/4.0

B.A. in Economics | Dual Concentration in Finance and Entrepreneurship & Innovation

Anticipated Graduation: May 2025

- Accomplishments: NCAA Division I Student-Athlete (Penn Track & Field and Cross Country); MAP Women's Playmaker '23
- Relevant Courses: Accounting & Financial Reporting, Corporate Finance, Monetary Economics & Global Econ., Strategic Cost Analysis
- Industry Education: Building a Financial Model, Core Data Analysis, Core Financial Concepts, Finance Interview Prep, Valuation 1: DCF
- Leadership Events: Participated in Leadership Events with Bank of America, Deloitte, Evercore, Oliver Wyman & JP Morgan Chase & Co.

EXPERIENCE

DICK'S Sporting Goods – *Financial Student Consultant* | Remote

01/2023 – 03/2023

- Designed a national marketing campaign to promote DSG's products to 100K+ new female customers for Women's History Month in 2023
- Owned the 'monitor phase,' managing a \$3.5M budget & allocating funds for direct (5+ quality creative assets) & indirect costs (personnel)
- Provided a financial algorithm to make the plan profitable & help DSG raise \$4B in total Q1 net sales/increase net sales by 6-8% from '22
- Led benchmark analysis to compare spend rationalization against 3 DSG female-focused initiatives:
 - **Good Sports**: audited a \$100k grant by DSG to distribute sports bras to under-resourced female athletes across the U.S. in 2021
 - **U.S. Girls Running Programs**: audited a \$500k grant by DSG to support under-resourced girls running programs in 2021
 - **U.S. Soccer Foundation**: audited a \$5M/3 yr. grant by DSG to support the Foundation's 'United for Girls' initiative in 2020

Access One – *Financial Planning & Analysis Intern* | Fort Mill, SC

06/2022 – 08/2022

- Completed 'Training the Street' online to prepare for the vast range of work evaluating the business's performance in new acquisitions
- Received valuable experience in the private capital raising process, refining modeling skills on Microsoft Excel, while also developing a 360° understanding financial analytics, learning about 4 innovative medical payment plan solutions to improve the health care market
- Estimated revenue opportunity of potential new clients to assist in growing & enhancing Access One's 300+ growing patient outreach efforts by further integrating their various payment plans with a new system, ultimately providing a stable solution the health care market
- Updated monthly financial packages and helped create trending revenue charts and sensitivity analyses to aid the company in their recapitalization process and efforts to acquire new partnerships

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – Women's Playmaker '23 (Team Billie Jean King) | Remote

01/2023 – Present

- Selected as 1 of only 120 college women athletes to participate in a two-month fellowship to prepare for careers in competitive industries
- Collaborated with a scrum team of 5 to develop a multi-year strategy for DSG's Women's History Month initiative with a 5-week timeline
 - Technical Skills Acquired: [Agile Project Management](#) | [Scrum Methodology](#) | [Tuckman's 5 Stages of Group Development](#)

Young Quakers Program (Netter Center) – Big Quakers Member | Philadelphia, PA

09/2021 – Present

- Coach children of the west Philadelphia school district (grades 4th through 8th), introducing them to sports, such as track and field
- Provide thoughtful leadership to 8-10 aspiring student athletes by actively encouraging them to participate in group activities, promoting open engagement in group conversations, and serving in different capacities as a role model, counselor, advisor, advocate, and friend
- Volunteer 3+ hours a week after classes to work with students in the program first-hand and provide a safe outlet for them to be active in their potential athletic endeavors as well as be a friendly confidant for those as needed

Kidz Run the Mill – Youth Running Camp Founder | Fort Mill, SC

06/2020 – 07/2021

- Founded a two-week camp that sought to teach local children of my community about the importance of proper warm-up/cool-down routines, nutrition, running form, and community service, fostering an environment that encouraged participants to live a healthy lifestyle
- Provided valuable personal experiences and simple yet memorable lessons, instilling in participants what it means to be well-rounded in their endeavors, whether that may be a student-athlete or not; created daily interactive presentations and committed 4+ hours of my time

Nation Ford Cross Country & Track – Team Captain | Fort Mill, SC

08/2019 – 06/2021

- Enhanced the team culture by being a leader for others during and outside of practice, acting as a mentor for younger athletes and new members (made up of approximately 50 students); my role was especially crucial when covid hit and I stepped up to be a communicative team player that others could confide in or seek out when we couldn't be together as a whole
- Coordinated weekly team meetings and pre-competition dinners to discuss our collective goals as well as share individual and group accomplishments throughout each season (stimulated a positive culture that could grow for years & attracted more people to join the sport)
- Encouraged fellow teammates and community sports members throughout each season, showing that the sport should bring people together—engaged with younger athletes in the sport who came to me for advice and used my success within the sport to be a leader

Beta Club – Student Body Secretary Officer | Fort Mill, SC

08/2020 – 05/2021

- Managed 1,000+ beta club members throughout the school and kept track of their service hours and overall contribution to the organization
- Planned monthly meeting presentations and club volunteering events to make sure that all members were informed about upcoming opportunities they could participate in (held approximately 5 large events per school year)
- United students at the school with the community at large to provide outlets for them to get involved in local initiatives that they may have otherwise not been exposed to or heard of before, representing a great way to align students with initiatives they were passionate about

KENDALL SMITH

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EDUCATION

Howard University – Washington, DC

GPA: 3.8/4.0

B.B.A. in Finance

Anticipated Graduation: May 2024

- **Accomplishments:** NCAA Division I Student-Athlete (Howard University Volleyball Team); Howard School of Business Dean's List; National Honor Society; Unanimously voted Athlete of the Year by the Central Suburban Conference; Sports Scholar Award; Co-Founder of Glenbrook South's Black Student Union; Morgan Stanley Richard B. Fisher Scholarship Program; MEAC All-Academic Team

The Marquee Group – Remote

Certification in Online Skills Training for Finance

06/2021 – 08/2021

- **Relevant Courses:** Excel I (Core Data Analysis), Building a Financial Model I & II, Capital Markets Overview, Company Valuation and Discounted Cash Flow Analysis (DCF), Finance 101, Financial Accounting, Advanced PowerPoint, Intro. to Microsoft Excel Shortcuts

EXPERIENCE

Morgan Stanley (Industrials) – *Investment Banking Summer Analyst* | New York, NY

06/2023 – 08/2023

- Worked on LBO, DCF, & PPT deck for a bake-off of a client with \$20B in revenues, spoke with client to hear feedback and get iterations to do a spin vs. sell transaction, and actively worked on the process of winning the deal from start to finish over the course of six weeks
- Acted as the full-time analyst on a deal with an associate, ED, and MD, in preparing capital structure benchmarking materials focused on leverage, ratings, and debt to equity metrics, for a client looking to prepare their company for an M&A deal transaction within the next year
- Worked on a CCC deal as the lenders, and learned how to build long-term relationships with clients to win the future sell side business
- Increased industry knowledge within the software space by learning how to extract key ideas out of articles, and updating the client with a market cap of \$125B, on recent M&A transactions and news on their competitors within the space, over the 10-week program

Bank of America (C&R, and TMT) – *Corporate Investment Banking Summer Analyst* | New York, NY

06/2022 – 08/2022

- Rotated across Consumer & Retail, and Technology & Telecommunications sector to conduct in-depth company and industry research
- Improved technical, modeling, and analytical skills, and executed deals with clients, while maintaining relationships for the bank
- Focused on advising companies' on how to structure their capital, and prepare for the current economic climate moving forward

Make A Play Foundation (MAP) – *D-League Fellow* | Remote

03/2021 – 04/2022

- Selected as 1 of 200 second-year athletes to participate in a fellowship designed to prepare under resourced athletes for professional success
- Received 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
- Participated in the following early insights programs through the Make A Play Foundation: Arctos Sports Partners (Private Equity), Bank of America (Sales & Trading), Credit Suisse (Capital Markets), Morgan Stanley (Global Capital Markets), UBS (Wealth Management)

Elyssa's Mission – *Community Service Volunteer* | Remote

04/2021 – 09/2021

- Developed fundraising strategies, raised awareness, and helped the organization fulfill its mission to educate students, staff, parents, and guardians on how to recognize and assist teenagers suffering from mental illness, depression, and suicide
- Created content, scheduled posts, and monitored social media metrics across Facebook, Instagram, and Twitter

Best Buy Co, Inc. – *Finance Intern* | Remote

06/2021 – 08/2021

- Aided the finance and accounting teams in building and maintaining the company's financial infrastructure and shaping the future of consumer electronics retailing through in-depth research, due diligence, market research, and financial forecasting
- Recommend actions by analyzing & interpreting data and working within the BNPL & leasing, credit card, and gift card departments

ColorVizion Lab – *Student Consultant* | Remote

05/2021 – 07/2021

- Developed a diversity recruitment strategy for a start-up company to attract, engage, and retain diverse talent through innovative outreach, personalized trainings, and process improvement (completed the course [Confronting Bias: Thriving Across Our Differences](#))

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Howard Volleyball Leadership Council – Team Leader | Washington, DC

08/2021 – Present

- Elected by team, as representative and voice for players, in terms of expressing concerns to the coaches, & overseeing team operations
- Leads drills, workouts, warmups, and cool downs during practice, and encourages a positive environment for all players

Howard University Women's Varsity Volleyball – NCAA Division I Student-Athlete | Washington, DC

08/2020 – Present

- Devote 25+ hours a week to: practice/training, film sessions, individual and team meetings, games, tutoring, travel, and community service
- Provide thoughtful leadership that is inclusive, transparent & empowering & supports the team's goal to develop teammates on/off the field
- Develop a results-oriented focus & skills in: communication, critical thinking, accountability, resiliency, teamwork, and time management

Leadership Summits – Selected Participant | Multiple Locations & Venues

08/2020 – 07/2021

- Selected to participate in the following leadership summits to sharpen technical skills for the finance industry: Bain & Company 2021 HBCU Program; Blackstone's Fall Future Women Leaders Program; Blackstone's HBCU Freshman Discovery Program; Citi Bank's 2020 HBCU Innovation and Leadership Symposium; Goldman Sachs Market Madness Spring Internship; JP Morgan HBCU & HSI Leadership Conference; Liberty Mutual's 2020 Student Diversity Symposium; PNC HBCU LEAD Summit; T. Rowe Price's Stock Pitch Program

CLUBS & ORGANIZATIONS

- Alpha Kappa Alpha Sorority Incorporated, Alpha Chapter, Member; **2022-Present**
- HU Chango Spanish Club, Member; **2021-Present**
- Howard University Investment Group, Member; **2020-Present**
- Howard Finance & Investment Club, Member; **2020-2022**

KENNEDY J. CALCAGNO

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EDUCATION

Texas Christian University – Fort Worth, TX

GPA: 3.76/4.0

B.A. in Finance | Minor in Accounting

Anticipated Graduation: May 2026

- **Accomplishments:** Academic All-Big 12, Dean's Honor List, Dean's Scholarship, The Alexander Award finalist- NCAA collegiate triathlon award
- **Relevant Courses:** Investments I, Financial Reporting I & II, Financial Management

PROFESSIONAL EXPERIENCE

William C. Conner Foundation Educational Investment Fund – *Equity Analyst* | Fort Worth, TX

December 2024 – Present

- Selected as one of 20 undergraduate and MBA students by TCU Faculty to manage a student-run university investment fund with AUM totaling ~\$2MM and yearly distributions to the fund's beneficiaries
- Collaborate with a team to evaluate and manage equity positions, utilizing financial modeling, industry analysis, and performance metrics to drive informed investment decisions
- Present comprehensive stock recommendations and portfolio performance updates to faculty advisors and fund beneficiaries, contributing to the fund's philanthropic and financial success

NAI Hiffman – *Accounting Intern for Commercial Real Estate Firm* | Oak Brook, IL

May 2024 – August 2024

- Managed daily check deposits and accurately recorded and applied receipts using the MRI accounting system across 40 properties for a real estate investment fund. Ensured timely and precise cash applications under deadlines, contributing to efficient financial operations
- Supported Accounts Receivable operations by thoroughly processing billing adjustments using the MRI system, collaborating with six team members, and assisting two accountants
- Assisted the accountant by managing corporate accounts receivable, posting journal entries, logging transactions, reviewing invoices, and updating financial records
- Gained insights into commercial real estate and the role of the property accounting department in asset management through a capstone project presented to senior leadership

Highlands Country Club – *Pool Server* | Westchester, IL

May 2023 – August 2023

- Managed registers by placing orders and satisfying requests and exceptions of over 50 recurring members to foster a more seamless service process
- Entrusted with guest credit cards and personal information to ensure accurate accounting by digitally recording transactions for the financials of the company

Activities & LEADERSHIP EXPERIENCE

TCU NCAA Women's Triathlon Team – *Captain* | Fort Worth, TX

August 2022 – Present

- Recognized as a "Scholar All-American Honorable Mention" recipient for maintaining over a 3.5 GPA and competing in the 2023 National Championship
- Lead the team in balancing demanding training sessions with academic responsibilities, fostering a supportive environment conducive to team cohesion and performance enhancement
- Dedicate 30+ hours weekly to training, recovery, and team activities, contributing to the success of a top-five nationally ranked NCAA team

Make-A-Play Foundation (MAP) – *Winter Fellow (Phase 1)* | Remote

January 2025 – Present

- Selected to participate in Phase 1 of an exclusive fellowship for high-achieving college athletes, competing against 200+ others in weekly mock interviews to proactively implement learnings from 3 modules + ~10 hours of instruction on behavioral/technical/hybrid interview preparation.
- Analyzed mock interview results each week from Fortune 500 HR professionals, dissecting the personalized feedback to make improvements for future interviews, submitting a self-evaluation form afterward to demonstrate my eagerness to continue learning.
- Attend weekly virtual recruiting events with MAP's diverse rolodex of partners (Evercore, NFL, Microsoft, Morgan Stanley, Procter & Gamble), learning how to transform my experience as a student-athlete into a successful post-playing career at a leading company.

Student-Athlete Advisory Council – *Team Representative* | Fort Worth, TX

August 2023 – Present

- Serve as a team representative by attending bi-weekly meetings and discussing changes within the athletic department on behalf of the women's triathlon team
- Organize events by collaborating with local leaders to connect student-athletes with the community

Finance Club – *Member* | Fort Worth, TX

August 2024 – Present

- Meet monthly with industry professionals to gain insights into finance trends, strategies, and career paths, enhancing practical knowledge of industry developments

NON-TECHNICAL SKILLS & INTERESTS

- **Skills and Language(s):** Financial Analysis, Time Management, Leadership, Communication, Team Collaboration
- **Programs:** Microsoft Office Specialist: Excel and PowerPoint, Tableau, SQL, Microsoft Teams, MRI, Bloomberg
- **Interests:** Weekly family dinners, creative baking experiments, solving puzzles and logic games, watching college sports

LEXI D. LOVE

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EDUCATION

Brown University – Providence, RI

GPA: 3.4/4.0

B.A. in Business Economics

Anticipated Graduation: May 2023

- **Accomplishments:** NCAA Division I Student-Athlete (Brown University Women's Basketball Team); Ivy League Athletic Honor Roll; NCAA Student-Athlete Advisory Committee (SAAC) Team Representative; Member of Black Student Union
- **Relevant Courses:** Financial Accounting, Intermediate Macroeconomics, Intermediate Microeconomics, Introduction to Econometrics, Making Decisions, Management Industrial/Nonprofit Organization, Organizations and Society, and The Digital World

TECHNICAL SKILLS

- **Advanced PowerPoint:** used MECE & Pyramid Principles to design business presentations for Fortune 500 companies
- **HubSpot Inbound Marketing:** used Inbound Marketing fundamentals to create a DEI strategy for a startup
- **IC Agile Training:** used agile fundamentals to lead a scrum team of ~10 using the cloud service, Air Table
- **Lean Six Sigma Training:** used lean six sigma's DMAIC framework to perform a current state analysis of BWPC
- **Project Management Professional (PMP) Training:** initiated, planned, executed, monitored & closed a project
- **Scrum Methodology:** worked in sprints to coordinate project activities and track goals, milestones, and OKRs

EXPERIENCE

Stifel Financial Corp. – *Investment Banking Summer Analyst* | New York, NY

06/2022 – 08/2022

- Developed & maintained complex financial models, performing various financial analyses, including valuations and merger consequences
- Conducted comprehensive & in-depth company and industry research after participating in due diligence sessions with deal team members
- Created statistical exhibits that analyzed comparative financial performance, building models to illustrate projected financial results/value
- Received comprehensive and on-going instruction in: accounting fundamentals, financial modeling, valuation, Excel, and PowerPoint

DICK'S Sporting Goods – *Sales & Marketing Student Consultant* | Remote

12/2021 – 02/2022

- Created a B2C marketing campaign to promote DSG's products to female consumers and expand the company's female-focused initiatives
- Introduced several marketing initiatives (product assortment, in-store programs, donations) to expand women's offerings in-store and online
- Customized brand messages, sales product strategies, timelines, and engagement rate benchmarks to align with DSG's wholesale campaign
- Qualified future sales opportunities using the MEDDIC framework to understand each phase of the prospective buyer's purchasing process

Black Women's Player Collective (BWPC) – *Growth & Operations Student Consultant* | Remote

08/2021 – 10/2021

- Created a 5-year strategic roadmap for the Executive Director of the BWPC to enhance the organization's structure and operating course
- Analyzed current practices through McKinsey's 7-S model to recommend ways BWPC can increase access to soccer for URM's in the U.S.
- Outlined the long-term vision needed to achieve the strategy by establishing S.M.A.R.T. goals to provide clarity for each year of the plan
- Designed a change management strategy to institutionalize the goals of the 5-year plan, using the "ADKAR" model for business change

New Canaan Group – *Wealth Management Intern* | Shelton, CT

06/2021 – 08/2021

- Assisted in providing customized strategies in the areas of Investment Planning, Risk Management, and Financial Planning
- Assisted financial advisors in relationship management, client follow-up, administration, and business development
- Researched, analyzed, and performed due diligence to review new investment opportunities and current solutions

ColorVizion Lab – *Strategy & Analytics Student Consultant* | Remote

05/2021 – 07/2021

- Developed a diversity recruitment strategy for an executive recruiting firm looking to attract, engage & retain diverse undergraduate talent
- Implemented HubSpot Inbound Marketing tools to build inclusion into the corporate infrastructure & create high retention levels for talent
- Developed key performance indicators (i.e., absenteeism rates, employee turnover rates, talent satisfaction) to measure HR performance
- Presented to ColorVizion Lab's leadership team leveraging Pyramid principles to subdivide the PowerPoint presentation into small buckets

Greater Cooper AMEZ Church – *Media Associate* | Oakland, CA

09/2020 – 06/2021

- Managed social media accounts and developed and executed visual graphics for weekly postings on internal/external forums
- Delivered content, videos, and photos during weekly services that succinctly and clearly communicated the desired message
- Prepared periodic reports on screening, tracking, and monitoring efficacy of produced content and campaigns

New Way Homes – *Summer Intern* | Remote

06/2020 – 08/2020

- Monitored customer experience platform to provide prompt, personalized, and complete resolutions to customer inquiries
- Managed social media accounts and engaged directly with customers across platforms by responding to comments/messages
- Collaborated with various stakeholders in scheduling staff meetings and facilitate communications

LEADERSHIP & SPECIAL ACTIVITIES

Make A Play Foundation (MAP) – D-League Fellow (Team Powerball); Finance Track

03/2021 – 04/2022

- Selected out of 400+ applicants to work on a case team with five other student-athletes, owning a distinct aspect of a project each month
- Managed a portfolio of complex initiatives with a scrum team of ~10 to consult 5 different minority-led startups within a calendar year
- Analyzed business challenges through systematic problem-solving frameworks (DMAIC, MECE, MEDDIC, PESTEL, SWOT, VUCA)

JP Morgan Chase & Co. – MAP Early Education Series Participant

06/2021 – 01/2022

- Met with different members of JPMC's Commercial Banking team once a month to learn more about Commercial and Corporate Banking
- Developed business acumen through exposure to firm-wide functions including Commercial Real Estate, Mid-Sized Businesses & Startups
- Learned how the firm manages relationships across the firm/globally in accordance with Corporations/Financial Institutions/Public Sector

Morgan Stanley Student-Athlete Mentorship Program – MAP Mentee

06/2021 – 08/2021

- Selected as one of 20 student-athletes to receive 1:1 mentorship with a current analyst at Morgan Stanley through ~5 bi-weekly meetings

Lindsey Zhang

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Education

Harvard University Cambridge, MA

GPA: 3.86/4.0

A.B. Candidate in Applied Mathematics – Economics, Minor in Computer Science | SAT: 1510

Graduation Date: May 2025

- **Activities:** Harvard University Varsity Volleyball – Co-Captain, Smart Women Securities, Exister Society Final Club, Harvard Undergraduate Asian Varsity Athletes Association – President & Co-Founder, Ringle Tutoring
- **Relevant Coursework:** Corporate Finance, Intermediate Micro & Macroeconomics, Innovation in Science and Engineering, Capital Markets, Using Big Data to Solve Economics Problems, Code Data and Art, Quantitative Methods in Economics

Experience

Bank of America Merrill Lynch

06/2024 – 08/2024

Mergers & Acquisitions Investment Banking Summer Analyst

New York, NY

- Supported senior bankers in executing live transactions, including due diligence, building valuation models, preparing Confidential Information Memorandums (CIM), and coordinating with both internal and external parties
- Developed skills in modeling, including sensitivity analysis, accretion/dilution analysis, and pro forma financial statements
- Provided administrative support such as managing data rooms and tracking deal progress through internal systems

Selected Transaction Experience:

- *\$750M Carve-Out Transaction (Healthcare Insurance, Active)* – Tracked potential buyers, managed extensive data room documents, handled late-stage bid rounds, and fielded diligence questions
- *\$50M Transaction (Luxury Beauty, Active)* – Created a revenue build with limited financial data, built a DCF model, reached out to potential buyers, and helped compile a lookbook for marketing the opportunity
- *\$100M Transaction (Industrials, Active)* – Ran sensitivity analyses, adjusted key variables for valuation numbers, and engaged in ongoing price negotiations with the buyer

UBS Investment Bank

06/2023 - 08/2023

Global Markets Sales & Trading Summer Analyst

New York, NY

- Collaborated with a diverse team on the Delta One trading desk, engaging in real-time analysis of market trends and monitoring risk exposure linked to index and ETF products
- Contributed to the preparation of customized investment proposals and presentations, tailoring strategies to address client needs and align with market opportunities
- Analyzed global economic indicators and geopolitical events to provide real-time updates to the Foreign Exchange Sales Trading Desk, gaining practical insights into factors influencing currency movements

Morgan Stanley

07/2022 - 08/2022

Strategy Student Consultant - Make a Play Foundation

Remote

- Create a financial wellness program to improve employee relationships in the post-Covid workplace
- Implement 3-year financial initiatives to assess Black/Hispanic workers' financial concerns at MS
- Leverage Pyramid & MECE principles on a PowerPoint presented to MS's Strategy & Operation team

Heineken USA & The Kraft Heinz Company

03/2022 - 05/2022

Strategy & Insights Student Analyst - Make a Play Foundation

Remote

- Led benchmark analysis to outline Heineken and Kraft's market share in the industry relative to other F&B companies
- Introduced streamline strategies to save \$2B in costs and adjust to changing consumer trends
- Analyzed financial statements to highlight areas needed of redistribution to succeed in the U.S. marketplace
- Create a year-by-year financial profile to support Kraft's EBITDA & EPA growth

Leadership & Activities

Harvard University Varsity Volleyball Team

08/2021 - Present

Co-Captain | NCAA Division I Student-Athlete | Academic All-District

Cambridge, MA

- Dedicate 25+ hours a week to training, individual and team meetings, film sessions, matches, travel, community service
- Elected as co-captain through nomination and team vote, serving as a pivotal liaison between players and coaching staff and providing unwavering support to fellow teammates in both academic and personal matters
- Develop a diligent work ethic on and off the court characterized by leadership, accountability, resiliency, time management, teamwork, communication, and productivity

Make a Play Foundation (MAP)

03/2022 - Present

Junior Board Member

Remote

- Initially selected out of 400+ applicants to lead a team of student-athletes in multiple case competitions partnered with Fortune 100 & 500 companies
- Work on case scenarios through problem solving frameworks, building financial models, DCF valuation, core data analysis
- Elected to serve as a Junior Board Member, overseeing the foundation's expansion initiatives and contributing to fundraising efforts

Skills & Interests

Skills: Project Management, Advanced PowerPoint, Excel Spreadsheets, Coding (JavaScript, Python, MATLAB, Stata, CSS, HTML)

Interests: Word Hunt, Restaurants, Marvel, Music, NYT games

Michaela E. Stanfield

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EDUCATION

University of Pennsylvania

Bachelor of Arts, Intended Major: Philosophy Politics and Economics (PPE)
Relevant Coursework: Microeconomics, Criminology, Economic Anthropology

Philadelphia, PA
Expected Graduation: May 2024

The Winsor School

High School Diploma
Relevant Coursework: AP Spanish (4), AP Statistics (5)

Boston, MA
June 2020

PROFESSIONAL EXPERIENCE

Massachusetts Attorney General's Office

Intern

Boston, MA
May 2021-Aug. 2021

- Wrote and distributed press releases pertaining to the office's pressing cases
- Participated in office wide meetings to discuss priorities of the day
- Engaged with local and national reporters to facilitate their coverage of Attorney General Healey's press conferences and public events

Converse

Intern

Boston, MA
April 2020

- Presented original case study on the intersection of sports, business, and law.
 - Engaged in market research on the effects of COVID-19 on consumer products and marketing strategies.
 - Facilitated conversations with key leadership figures throughout Converse, Nike, and Jordan brands.
-

LEADERSHIP EXPERIENCE & AFFILIATIONS

University of Pennsylvania, Varsity Women's Basketball Team

Student Athlete

Philadelphia, PA
Aug. 2020 – Present

- Recruited as NCAA Division I varsity athlete based on outstanding performance in Amateur Athletic Union (AAU) program.
- Balance the rigors of weekly workouts, practices, travel, and related activities with demanding course load and student involvement.
- Participate in community engagement opportunities, including Nonprofit organization, *Beat the Streets*, and the Children's Hospital of Philadelphia.

University of Pennsylvania, Black Pre-Law Association

Member

Philadelphia, PA
Aug. 2020 – Present

- Engage in student leadership organization for Black students at the University of Pennsylvania through weekly attendance at meetings and participation in pre-law programming.

The Winsor School, Single-Parent Family Outreach Club

Organization Leader

Boston, MA
Aug. 2018 – June 2020

- Selected as president for student organization at The Winsor School.
- Coordinated distribution of food and resources to single-parent families in the Greater Boston area.
- Managed the collection of donations for food drives and facilitated partnerships with local schools for the recruitment of volunteers.

Greenwood Elementary School, Tutoring Program

Tutor

Boston, MA
Aug. 2016 – June 2020

- Worked one-on-one with elementary aged student, serving as tutor in English and Language Arts.
- Utilized Spanish language ability to translate vocabulary and support reading proficiency skills for students.

The Winsor School, Varsity Basketball Team

Team Captain

Boston, MA
Aug. 2016 – June 2020

- Served as member of Winsor Varsity Basketball Team for all four years of high school.
 - Recognized as all-time leading scorer for program (1500+ points).
 - *Honors & Awards:* McDonalds All-American Nominee (2020), Boston Globe All-Scholastic Awardee (2018, 2019, 2020), Winsor Bremmer Athletic Prize Recipient (2020), Winsor Basketball Cup Recipient (2019, 2020)
-

SKILLS & INTERESTS

Language: Spanish (Advanced) **Skills:** Microsoft Office, Statistical and Data Analysis, Research, Analytical Writing

Interests: Mentoring, Basketball, Youth Engagement, Travel

OLIVIA H. KIM

(925) 596-4140 • OHK2103@COLUMBIA.EDU

EDUCATION

Columbia University – New York, NY

B.A. in Economics

Anticipated Graduation: May 2026

- Accomplishments: NCAA Division I Student-Athlete (Swimming & Diving); VP of Columbia Voice in Sports (VIS), MAP Fellow
- Relevant Courses: Principles of Economics, Calculus I, Calculus III, Macroeconomics, Microeconomics, American Economy, Statistics

EXPERIENCE

Prospect Rock Partners – 2024 Summer Research, Strategy & Marketing Intern

May 2024 – Present

- Research, write, and publish weekly blog posts on the Prospect Rock Partners website to drive traffic, establish the company as a trusted resource, and engage with potential investment banking recruits
- Develop and execute a strategy to establish Prospect Rock Partners' social media presence
- Analyzing investment banking MD movers and trends for 2024. Used spreadsheets to collect and clean data using models to depict trends, and created a condensed presentation report for potential clients, all the while communicating effectively with manager's needs.

RBC Capital Markets – Women's Advisory Program; Global Investment Banking Track | Hybrid

October 2023 – February 2024

- Selected to participate in an industry-leading, multi-month early insight and professional development program for female sophomores interested in pursuing a career in finance as well as a thorough orientation to RBC Capital Markets and early access to a network
- A structured, multi-month program involving in-person and virtual development opportunities matches with RBC employees as mentors in Global Investment Banking to foster deeper learning of the industry
- Proactively commit to scheduling and participating 1:1 meetups with Advisor 1 and to joining Advisor 2 pod meetups and come prepared to engage with the session topic(s), questions, solicit feedback and advice on how can improve skillset and knowledge

Bank of America – Equity Research Student Analyst; Scrum Master (Team Janet Yellen) | Remote

September 2023 – November 2023

- Motivated and led a scrum team of 4 in developing the best possible portfolio for a client seeking diversification, considering the 2023 macroeconomic backdrop in our investment thesis & exhibiting leadership ability by establishing team rules & scheduling weekly meetings
- Clarified our team's main objectives by sending out a summary email which included prior research I conducted, my meeting notes with our BofA mentor (VP/Trading Strategist II, Cait Walsh), the Air Table link & a master document to help ensure a smooth process for all 4
- Consolidated our team's possible arguments into a single master document with hours of research done to help my team brainstorm our argument properly and establish a great foundation for the rest of the case competition sponsored by BofA's Global Markets Division
- Advocated for ETFs in the tech sector to help create diversification and stability in our client's portfolio to combat the declining economic situation for our client after collecting market data from the US job economy to help our team predict the economic outcome for the year

Morgan Stanley – Fixed Income Student Analyst (Team Madam C.J. Walker) | Remote

April 2023 – June 2023

- Selected to participate in an invite-only case competition with Morgan Stanley's Fixed Income Division, developing an investment thesis for MD, Stephen Dance, to recommend the best asset for a client to invest in through '23 (i.e., treasuries, equities, investment grade credit)
- Created an investor profile, mapping all the touchpoints a client would consider when considering my team's final recommendation (goals, financial situation, time horizon, risk tolerance), compiling all pain points into one timeline of steps moving toward a continuous direction
- Performed a profit and loss (P&L) scenario analysis, outlining future states of the asset through 3 basic scenarios (base case scenario, worst case scenario, best case scenario), building scenarios into a single slide to project potential investment returns & losses for Morgan Stanley

Lions Swim Academy – Substitute Swim Instructor | New York, NY

January 2023 – February 2023

- Mentored a group of young children (ages 10-14) as a substitute swim coach, inspiring them and fostering their love for swimming
- Prioritized the swimmers' health by promoting a balance between hard work and rest, encouraging them to listen to their bodies and take short breaks when needed to ensure continued progress in swimming while minimizing risk of injury or exhaustion

Amador Valley High School – Teaching Assistant | Pleasanton, CA

August 2021 – June 2022

- Collaborated with the Algebra and Geometry teacher to systematize a grading system for over 100 assignment papers per week, providing timely feedback to students on their mistakes and explaining correct solutions to help them succeed in their math classes
- Supervised and guided students during warm-up exercises in the Algebra and Geometry classes, facilitating their learning process without providing answers, and encouraging them to ask for help when needed, promoting efficient learning and problem-solving skills

LEADERSHIP & COMMUNITY DEVELOPMENT

Amador Valley High School – Team Captain | Pleasanton, CA

January 2022 – May 2022

- Led team cheers and meetings before dual meets, fostering team spirit and unity among teammates, and assisting high school coaches in maintaining connectivity between the high school team and competitive club teams, resulting in enhanced cohesion and communication
- Showcased hard work and dedication by making it to the finals of the CIF State Championships in freshman year, becoming the sole representative of the school in the competition, demonstrating leadership and commitment to excellence

Pleasanton Seahawks Inc. – Award Banquet Lead | Pleasanton, CA

July 2016 – November 2021

- Assembled and organized the names and times of hundreds of swimmers on my team, cross-checked and verified the information with team, Pacific Swimming, and National Age Group record databases to ensure accuracy for awards
- Collaborated with other leads through email or in-person meetings on a weekly basis to ensure a smooth and efficient process for organizing and executing a successful team banquet, managing the printing and editing of hundreds of awards in the process

SKILLS & INTERESTS

- Skills: Microsoft Office - Excel, PowerPoint, Word
- Interests: Reading books, watching sunsets on the beach, drawing, making bead rings.

REBECCA R. LYNN

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EDUCATION

Yale University – New Haven, CT

GPA: 3.3/4.0

B.A. in Economics | SAT: 1440

Anticipated Graduation: May 2026

- **Accomplishments:** NCAA Division I Athlete (Tennis), 2023 ITA Scholar-Athlete, Internship at RX3 Growth Partners (Growth Equity Firm backed by Aaron Rodgers), ITA All-Academic Team (Tennis), Member of Smart Women's Securities Investment Board (Yale Chapter)
- **Relevant Courses:** Accounting, Microeconomic Analysis, Macroeconomics
- **Wall Street Prep Education by 2024:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

EXPERIENCE

UBS – *Incoming Wealth Management Student Analyst* | New York, NY (Remote)

January 2024

- Expected to collaborate with a team of 6 to introduce a marketing strategy to UBS for Women's History Month in 2024, helping to scale women's control of the U.S. wealth market from \$10T in 2020 to \$30T by 2030 (~300%) & highlight women's collective spending power
- Expected to present a 12-page slide deck to UBS's Wealth Management Team in March, applying the Pyramid Principle to consolidate my team's slides into a cohesive document, ensuring we jointly present our top conclusions first, followed by supporting arguments/data/facts

Bank of America – *Equity Student Analyst; Scrum Master (Team Louise M. Weiser)* | Remote

September 2023 – November 2023

- Led a presentation for a stock pitch competition sponsored by Bank of America, developing an investment thesis and portfolio for a hypothetical client that recommended the best portfolios of equities to invest in through the end of 2023 (minimum of 3 securities)
- Developed a 2-page written project charter with S.M.A.R.T. goals + a schedule of tasks and milestones for each sprint of the project (5), serving as an ongoing guide to help my scrum team of 4 remain on task against a 5-week deadline for BofA's Global Markets Team
- Planned meetings with our BofA mentor (Senior Securities Sales Director, [Leena Das](#)) and teammates to create the optimal stock pitch, approving and submitting a final 10-12-page slide deck + a single master document outlining the materials produced by the project to BofA
- Directed the framework and orientation of the stock pitch, overseeing the creation/successful execution of our team's: (1) Macroeconomic Analysis; (2) Recommendation Report; (3) Equity Selection; (4) Investment Thesis; (5) Profit Target; and (6) P&L Scenario Analysis
- Produced a 1-page impact statement summarizing the economic, environmental, and social impact of my team's efforts, highlighting the career of [Louise Weiser](#), the first woman to be named the President of an American bank, to deliver an ethos behind our investment thesis

RX3 Growth Partners – *Growth Equity Financial Analyst* | San Juan Capistrano, CA

June 2023 – August 2023

- Demonstrated proficiency in financial modeling by constructing cash flow projections, analyzing earnings, and assessing Total Addressable Market (TAM) for potential investments
- Crafted presentations that delved into market trends, industry dynamics, and competitor analysis, providing comprehensive insights to inform strategic decision-making
- Conducted research on the impact of artificial intelligence (AI) in the consumer industry and effectively presented the findings and thesis to senior management, contributing valuable insights to the organization's strategic direction

LEADERSHIP & COMMUNITY DEVELOPMENT

Yale University Varsity Tennis – Student Athlete | New Haven, CT

August 2022 – Present

- Demonstrated exceptional commitment to a team by dedicating more than 30 hours a week to daily team practices, off-court training, games, and individual lessons, all while successfully balancing a demanding academic schedule and consistent travel commitments
- Cultivated a positive team culture by organizing and facilitating weekly bonding activities, contributing to team cohesion and camaraderie
- Achieved a career-high national ranking of 13 in the recruiting class of 2022, garnering interest from over 50 Division I colleges, reflecting exceptional athletic talent and achievement

Smart Women Securities – Junior Buy-Side Lead on Investment Board | New Haven, CT

June 2023 – Present

- Collaborated with a team of peers to conduct in-depth market research and analysis, sharing insights & contributing to investment strategies
- Assessed and managed risks associated with various investment options, ensuring alignment with the organization's risk tolerance
- Produced detailed investment reports and presentations, effectively communicating complex financial information to diverse audiences
- Provided stock recommendations and played a role in managing a portfolio with a value of \$50,000+, contributing to portfolio performance

Spoon University: Yale Chapter – Co-Founder, Editor, Treasurer | New Haven, CT

September 2022 – Present

- Authored restaurant reviews and engaged in discussions about intricate culinary creations, catering to the tastes/interests of Yale students
- Led a dynamic team of writers and editors as the Editor-in-Chief, overseeing content creation, publication schedules, and editorial direction, resulting in consistently high-quality and engaging newspaper issues

Bank of America – MAP Women PITCH Too Fellow '23 | New York, NY (Remote)

September 2023 – November 2023

- Selected as 1 of 50 women athletes to participate in a stock pitch competition, culminating in a final presentation at BofA's NYC office
- Collaborated with a team of 4 to develop a stock pitch to be reviewed by a panel of BofA's junior research analysts, salespeople & traders
- Met with a BofA mentor 2x/week to customize 10 PowerPoint slides demonstrating our team's view on the stock & our decision-making
- Received 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
 - Technical Skills Acquired: [Agile Project Management](#) | [Scrum Methodology](#) | [Tuckman's 5 Stages of Group Development](#)

United States National Tennis Team – Athlete | Buenos Aires, Argentina

December 2022 – January 2023

- Trained and competed as a member of the US National Pan-American team, showcasing dedication and skill in international competition
- Played a key role in fostering a positive team environment during the Pan-American Maccabi Games, contributing to team cohesion and spirit during the competition

NON-TECHNICAL SKILLS & INTERESTS

- **Interests:** Food & Sports; I also love browsing international grocery stores in search of new and exciting products!

SERGIO ROJAS

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EDUCATION

Rice University – Houston, TX

GPA: 3.86/4.0

B.A. in Business (Concentration in Finance & Psychology) | SAT: 1390

Anticipated Graduation: Spring 2026

- Accomplishments: NCAA Division 1 Student-Athlete (Rice University T&F); MAP x Morgan Stanley First-Year Scholar '23
- Relevant Courses: Financial Accounting, Leading People in Organizations, Data Analytics, Strategic Management, Intro. to Economics
- Wall Street Prep Education by 2024: Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

EXPERIENCE

180 Degrees Consulting – Consultant | Houston, TX

01/2023 – Present

- Complete various projects to solve clients' problems as a part of a broader consulting team
- Executed and successfully delivered our first project which involved creating a customized grant database and survey
- Gain problem-solving and planning skills during a semester-long project and also learned research skills that I can use in the future

Rice Sports and Nutrition Center – Employee | Houston, TX

01/2023 – Present

- Provided student-athletes with healthy snacks, distributing 50-70 items per day during my shift
- Prepared and distributed a variety of food and smoothies to student-athletes, making 30-35 smoothies per shift
- Notified the manager when inventory was low, ensuring the nutrition center always had the necessary foods in stock

Morgan Stanley – Fixed Income Student Analyst; Strategy (Team Martha De La Torre) | Remote

04/2023 – 06/2023

- Selected to participate in an invite-only case competition with Morgan Stanley's Fixed Income Division, developing an investment thesis for MD, Stephen Dance, to recommend the best asset for a client to invest in through '23 (i.e., treasuries, equities, investment grade credit)
- Performed a general macroeconomic analysis using the P.E.S.T.E.L. framework to determine which asset class my team's client should allocate their money into, assessing political, economic, sociological, technological, legal, and environmental factors affecting investments
- Implemented Lean Six Sigma's DMAIC framework to guide the analysis, "measuring" and "analyzing" 6 factors and consolidating them into a single slide, organizing them based on impact (low, medium, high) to provide a 360° view of the current macro-environment to MS
- Authored a 2-page recommendation report to propose different asset classes to my team given the economic climate and backdrop of 2023, introducing ~5 possible resolutions that guided the team's final recommendation presented to Morgan Stanley through a 12-page slide deck

LEADERSHIP & COMMUNITY DEVELOPMENT

Warburg Pincus – MAP Elite 100 Investment Fellow | Remote

09/2023 – Present

- Selected as 1 of 100 second-year athletes to participate in a five-part fellowship designed to prepare BIPOC students for careers in banking
- Collaborate with 5 athletes + 1 IB head coach to prepare a final buy/sell/hold recommendation & price target to Warburg's leadership team

Rice University Cross Country, Track – NCAA Division I Student-Athlete | Houston, TX

08/2022 – Present

- Encourage team bonding events, resulting in a weekly team dinner for the freshman class with around ~20 attendees & strengthening bonds
- Motivate teammates to use the training room resources, resulting in fewer injuries among first-year students.
- Work 9 hours/week at the Rice Performance and Nutrition Center, producing & distributing healthy snacks to student-athletes after practice

Make A Play Foundation (MAP) – Morgan Stanley 'Skills Challenge' Mentee | Remote

04/2023 – 06/2023

- Selected as 1 of 150 first-year athletes to participate in an eight-week fellowship designed to hone technical skills for a career in finance
- Received 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for finance roles

Sex Week Educational Awareness Team at Rice – Treasurer | Houston, TX

10/2022 – 02/2023

- Allocated \$3,000 to various events during SWEAT week in an efficient manner
- Raised \$1,400 for organization events by funding multiple sources of income
- Recruited strongest candidates for the executive SWEAT team board from a pool of 104 applicants, to build an efficient team for next year.

Best Buddies International – President | Houston, TX

04/2021 – 05/2022

- Led the executive board and club members to create a welcoming environment for students with IDD in our school, coordinating 7 inclusivity-promoting events throughout the year
- Raised \$1,000+ for the club through t-shirt and merchandise sales to ensure its success, despite economic obstacles after COVID, I and the executive board raised
- Managed the organization's participation in the Houston Friendship Walk, resulting in a \$1,400 donation to Best Buddies International and a turnout of 35 members representing the club

Ridge Point High School – Student Body President | Missouri City, TX

03/2021 – 05/2022

- Administered weekly club meetings, events, and advisor meetings throughout my senior year as a student council member
- Coordinated school-wide events with my executive board, including prom, homecoming, blood drives, and outreach events for the student body and community
- Guided the executive board and members to recruit 30+ new members for the student council after returning to school post-COVID

Mathnasium – Tutor | Missouri City, TX

01/2021 – 05/2022

- Tutored 15-20 K-12 students daily using Mathnasium techniques, including Socratic questioning
- Directed students to make the most of our allotted time, typically working through 12-18 math problems, teaching multiple skills, and answering any questions

NON-TECHNICAL SKILLS & INTERESTS

- Interests: I enjoy reading, exploring new places in Houston (specifically restaurants), and traveling.

SHOMARI D. STONE

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EDUCATION

University of Michigan – Ann Arbor, MI

GPA: 3.5/4.0

B.A. in Economics

Anticipated Graduation: May 2026

- Accomplishments: NCAA D1 Student Athlete – Football, 2022 BIG 10 Champion, WCAC '22 Champion (Football & Track), High School Honor Society, Economics @ Work Leadership Team for Michigan; Evercore NY Sophomore URM Diversity Leadership Summit
- Relevant Courses: Economic Principles, Business Administration and Management, Calculus, Data Analytics, Economic Markets, Accounting
- Wall Street Prep Education by 2024: Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

EXPERIENCE

Warburg Pincus – Investment Banking Student Analyst; Scrum Master | New York, NY (Remote)

January 2024 – March 2024

- Advised Warburg on the potential acquisition of a new HVAC company, approving the design of a 3-Statement Model used to forecast my team's income statement, balance sheet & cash flow statement for up to 5 years, delivering a final presentation to the Human Capital Team
- Collaborated with a team of 6 pre-professionals to produce a comparable company analysis, DCF sense check & 5+ financial assumptions
- Approved and submitted a final 12-page pitchbook + single master document (CIM) outlining the materials produced by the project and how they have been organized to Warburg leadership, formally closing the project & transferring all materials/solutions to Erin Remedios

BlackGen Capital – Investment Analyst | Ann Arbor, MI

August 2022 – December 2023

- Collaborated with an interdisciplinary team of undergraduate investment analysts in a competitive multi-campus stock pitch competition, contributing to the Black Gen National Investment Fund's \$90,000 diversified portfolio
- Researched companies across diverse industries to identify factors conducive to long-term stock market holds
- Completed a 14-week immersive course covering foundational concepts in accounting, finance, and valuation methods

Wells Fargo – Fratarcangeli Wealth Management – Market Research Summer Analyst | Bloomfield Hills, MI

June 2023 – August 2023

- Facilitated client and advisor meetings for the firm's managing principal, ensuring efficiency by generating pre- and post-meeting notes, inputting client information, constructing presentations, and compiling detailed reports
- Constructed and analyzed equity portfolio models across diverse industries for clients with account sizes up to \$150 million
- Developed comprehensive client portfolio performance reviews, conducting asset allocation analyses and providing in-depth net worth summaries

LEADERSHIP & COMMUNITY DEVELOPMENT

Warburg Pincus – MAP Elite 100 Investment Fellow | New York, NY (Remote)

January 2024 – Present

- Selected as 1 of 100 second-year athletes to participate in a five-part fellowship designed to prepare BIPOC students for careers in banking
- Receive 20+ hours of virtual instruction in accounting, technical interview preparation & industry-specific training for future banking roles
- Collaborate with 5 athletes + 1 IB head coach to prepare a final buy/sell/hold recommendation & price target to Warburg's leadership team
 - Wall Street Prep Education: [Accounting Crash Course](#) | [Investment Banking Interview Guide](#) | [Financial Statement Modeling](#)

University of Michigan Economics Department – Economics at Work Leadership Team Member | Ann Arbor, MI

August 2023 – Present

- Represent the economics department at alumni luncheon events, showcasing strong interpersonal skills
- Coordinate the preparation of alumni speaker presentations, incorporating creative visual elements and storytelling techniques for enhanced audience engagement
- Assist in delivering 10 presentations to students on various finance branches through alumni stories, promoting insightful learning

University of Michigan Varsity Football – Student Athlete | Ann Arbor, MI

April 2022 – Present

- Collaborate with defensive coaches for the 2023 football season, contributing to the #1 ranked college football team in America with a 12-0 record and a BIG10 conference championship title
- Design comprehensive slide decks to enhance player learning, breaking down 400+ hours of film for analysis
- Volunteer at the Boys and Girls Club, constructing 200+ beds and writing inspiring messages on headboards

Kicks & Clicks – Founder / CEO | Washington, D.C.

October 2019 – June 2022

- Specialized in selling limited edition streetwear and automated purchasing software, generating a successful portfolio with \$25K in revenue
- Conducted market research to analyze pricing trends and competitors, ensuring accurate and competitive pricing strategies
- Implemented effective marketing campaigns to boost brand visibility, resulting in 250+ successful transactions

D.C. State Chess Association – Student Chess Teacher | Washington, D.C.

August 2017 – June 2019

- Supervised chess tournaments with 300+ participants, creating an engaging environment for strategic application and theoretical learning
- Delivered inclusive chess lessons on strategies/tactics to students of varying skill levels, utilizing theoretical concepts to effectively teach
- Competed in 10+ ranked chess tournaments, securing 4 intermediate championships and maintaining a rating exceeding 1200

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Stocks, Watching Anime, Trying New Foods (My favorite foods are acai bowls and shrimp alfredo).

SOLOMON J. CHRISTOPHER

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EDUCATION

Amherst College – Amherst, MA

GPA: 3.6/4.0

B.S. in Mathematics | SAT: 1390

Anticipated Graduation: May 2025

- Accomplishments: NCAA Division III Student-Athlete (Football); NESCAC All-Academic Team; CSC Academic All District Team
- Relevant Courses: Intro to Economics, Intermediate Statistics, Calculus I-II, Intro to Psychology, Public Economics
- Industry Education by Spring 2024: 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

EXPERIENCE

Deloitte – *Incoming Olympic Global Partnership Student Analyst* | New York, NY (Remote)

January 2024 – Present

- Expected to deliver a transformation strategy to Deloitte outlining innovative ways to bolster the International Olympic Committee's (IOC) Olympic & Paralympic Agenda 2020+5, specifically addressing personalization of the fan experience and enhancement of digital services
- Expected to collaborate with a team of 6 to assist the Olympic Movement in driving progress on critical challenges identified in Olympic Agenda 2020+5 related to corporate governance, strategy, sustainability, diversity, equity and inclusion, and athlete support and well-being

Simple Wholesome – *Cashier and Barista* | Los Angeles, CA

March 2021 – Present

- Collect and assess end-of-night inventory in order to sign off on inventory deliveries, totaling \$1000 of inventory a month
- Orchestrate current and new employee training, directly overseeing and instructing 15 new employees, familiarizing them with procedures
- Facilitate friendly and helpful interactions with customers resulting in an increase in responsibilities and being offered a seasonal position

Irongate – *Real Estate Analyst* | Los Angeles, CA

June 2023 – August 2023

- Researched different brands of household items based on buyers' budget resulting in a quicker and efficient purchasing process for buyers
- Identified buyer trends in luxury vacation home market resulting in the improvement of marketing strategies that increased clientele
- Facilitated meetings to brief development team on potential ideas to add to resort leading to improvements on resort golf course

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – D-League Fellow '23 (Winter Cohort) | Remote

December 2023 – Present

- Selected as 1 of 100 college athletes to participate in a fellowship designed to prepare under-resourced athletes for professional success
- Receive 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
- Collaborating with a 6-person scrum team to develop a multi-year strategy for Deloitte's 2024 Olympic agenda against a 5-week deadline
 - Technical Skills Acquired: Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development

Amherst College Football – NCAA Division III Student-Athlete | Amherst, MA

August 2021 – Present

- Coordinate weekly dinners and events among the defensive back group position, increasing group cohesion
- Dedicate 25+ hours a week for practices, film sessions and meeting, balancing academics and athletics on a competitive level
- Lead film and playbook meetings from incoming first-year defensive backs, aiding 2 freshmen gaining starting positions during the season
- Support first year defensive back coach, offering strategies and suggestions, leading to a more cohesive and communicative unit

Amherst-Pelman Regional High School – Tutor | Amherst, MA

February 2023 – May 2023

- Mentored high school students on college application process resulting in 10 students gaining acceptance into their top college choices
- Managed a group of high school students, offering tutoring in resulting in students reporting an average grade increase of 5%
- Cultivated a fun, learning environment for high school students in which students, parents, and teachers reported positive feedback

Harvard-Westlake Black Awareness and Culture Club – Executive Member | Los Angeles, CA

August 2020 – May 2021

- Approved and monitored budget for weekly meetings (i.e. guest speaker), ensuring that there was funding to invite one speaker per month
- Coordinated weekly meetings and set itineraries resulting in well thought out weekly meetings, increased attendance by 50% in 2021
- Tutored younger members in the group for upcoming SAT exams resulting in an a 20% increase in the organizations average SAT scores

Harvard-Westlake School Football – Captain | Los Angeles, CA

August 2020 – April 2021

- Cultivated an inclusive as well as winning team culture resulting in an undefeated season and first league championship in program history
- Oversaw weekly position group meetings, provided players with feedback resulting in 3 members of the team winning all league honors
- Assembled weekly scouting reports for each opponent, preparing the team to adequately prepare to opponents and remain undefeated

Solomon's Neighborhood Club – Organizer | Los Angeles, CA

June 2020 – August 2020

- Coordinated a neighborhood club for kids to stay active during pandemic, and spearheaded recruitments efforts to gain 10+ members
- Monitored kids as they rode bikes, played sports, and did arts and crafts in which they created long lasting friendships among other children
- Taught kids how to ride bikes and play various sports resulting in 4 kids continuing to play football and 3 learning how to ride bikes

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Mathematics, Cooking, and Dogs.

SOPHIA G. DAVIS

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EDUCATION

Tufts University – Medford, MA

GPA: 3.1/4.0

B.A. in Economics | Minor in Finance and Urban Studies

Anticipated Graduation: Spring 2026

- Accomplishments: NCAA Division III Student-Athlete (Tufts Women's Basketball); MAP x Morgan Stanley First-Year Scholar '23
- Relevant Courses: Principles of Economics, Calculus, and Introduction to Urban Studies
- Wall Street Prep Education by 2024: Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

EXPERIENCE

Warburg Pincus – *Investment Banking Student Analyst; Scrum Master* | New York, NY (Remote)

January 2024 – Present

- Advised Warburg on the potential acquisition of a new HVAC company, approving the design of a 3-Statement Model used to forecast my team's income statement, balance sheet & cash flow statement for up to 5 years, delivering a final presentation to the Human Capital Team
- Collaborated with a team of 6 pre-professionals to produce a comparable company analysis, DCF sense check & 5+ financial assumptions
- Approved and submitted a final 12-page pitchbook + single master document (CIM) outlining the materials produced by the project and how they have been organized to Warburg leadership, formally closing the project & transferring all materials/solutions to Erin Remedios

United Health Group (UHG) – *Management Student Consultant (Team Marilyn Hughes Gaston, MD)* | Remote

July 2023 – August 2023

- Oversaw the initiative to introduce a certified doula program to UHG for Black Maternal Health Week in 2024, developing a business transformation strategy to assist Black & low-income women during pregnancy, birth & postpartum, and reduce the mortality rate by 15%
- Onboarded team by hosting a 2-hour project kick-off, establishing objectives/key results (OKRs), explaining agile/scrum processes, and scheduling weekly sprint reviews, collaborating to create/submit a project charter with a schedule of tasks/milestones by end of the meeting
- Produced a 1-page impact statement summarizing the economic, environmental, and social impact of my team's efforts, highlighting the career of Dr. Marilyn Gaston (the 1st black woman to direct the Bureau of Primary Healthcare) to deliver an ethos behind our business plan

Morgan Stanley – *Fixed Income Student Analyst; Strategy (Team Marvin Ellison)* | New York, NY

April 2023 – June 2023

- Achieved 1st Place out of 20 teams after presenting an investment thesis to Morgan Stanley's Fixed Income Division live in NYC on investment grade corporate bond ETFs, receiving a total score of 59 out of 60 and receiving unanimous praise from MS's panel of judges
- Performed a general macroeconomic analysis using the P.E.S.T.E.L. framework to determine which asset class my team's client should allocate their money into, assessing political, economic, sociological, technological, legal, and environmental factors affecting investments
- Implemented Lean Six Sigma's DMAIC framework to guide the analysis, "measuring" and "analyzing" 6 factors and consolidating them into a single slide, organizing them based on impact (low, medium, high) to provide a 360° view of the current macro-environment to MS
- Authored a 2-page recommendation report to propose different asset classes to my team given the economic climate and backdrop of 2023, introducing ~5 possible resolutions that guided the team's final recommendation presented to Morgan Stanley through a 12-page slide deck

Metlar Bodine House Museum – *Senior Intern* | Piscataway, NJ

June 2019 – April 2023

- Engaged 50 young students through museum programs catered to youth, up from 20 the year before
- Managed social media content for exhibit promotion, resulting in 50 more followers and a 30% increase in engagement
- Conducted interviews with prominent residents, curated and showcased in popular exhibits for added personality and purpose

Blair Academy – *Senior Class Council* | Blairstown, NJ

May 2021 – May 2022

- Improved student-faculty communication by attending 20+ meetings, sharing concerns, and enhancing community cohesion/understanding
- Successfully organized Senior Skate Night, with 80% participation, by renting a roller skating rink and providing food to celebrate graduating seniors, making it one of the most popular events of the year
- Engaged student body as a weekly news presenter at Friday School Meetings, boosting on-campus activity and athletics participation

LEADERSHIP & COMMUNITY DEVELOPMENT

Tufts University Women's Basketball Team – NCAA Division III Student-Athlete | Medford, MA

September 2022 – Present

- Played a key role on a championship team, starting games and contributing to advancing to Division 3 "Elite Eight"
- Produced and hosted a weekly radio show with 60+ listeners, featuring campus news and engaging content
- Coached and assisted 50+ prospective student-athletes at basketball camp, answering questions and giving tours

Black and Latino Student Union – Co-President | Blairstown, NJ

March 2020 – May 2023

- Organized inaugural "Block Party" for Black and Latino members, featuring food, music, and games, which was attended by 100+ students
- Increased club membership and meeting attendance by 15 members through weekly communication and meetings via email and in person
- Recruited 15 new members to the Black and Latino Student Union by reaching out early in the year and inviting them to curated events

Medford Department of Recreation – Volunteer | Medford, MA

January 2023 – January 2023

- Led soccer drills and games for 15 special needs students aged 3-8, promoting focus and participation
- Mentored students, offering support and sharing college athlete experience, connected with students and families from various backgrounds

Morgan Stanley – Investment Management Career Discovery Day Participant | Boston, MA

October 2022 – October 2022

- Selected to attend a half-day workshop that provided students with an opportunity to explore opportunities in Investment Management
- Gained insight into various groups within the Investment Management division, including Fixed Income, Equity, and Calvert

Tufts University Women's Basketball Team – Camp Counselor | Medford, MA

June 2022 – June 2022

- Led 10 prospective student-athletes through a campus tour, Q&A, and practice, providing insight into college student-athlete life
- Provided campus tours to 100+ Tufts Women's basketball camp participants, showcasing the university and program

NON-TECHNICAL SKILLS & INTERESTS

- Interests: I enjoy listening to music (currently learning how to DJ events), cooking, history, and fashion.

SOPHIA C. STELLABOTTE

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EDUCATION

Columbia University – New York, NY **GPA: 3.94/4.0**

B.A. in Chemical Engineering | SAT: 1540 | Graduation Year: Spring 2026

- **Relevant Courses:** Humans & The Carbon Cycle, Transport Phenomena, Engineering Separations, Reactor Kinetics, Chemical Engineering for Humanity, Sustainable Water Treatment and Development

Case Western Reserve University – Cleveland, OH **GPA: 3.90/4.0**

Attended from August 2021–May 2024

- **Accomplishments:** Dean's High Honor List, Van Horn Society, AIChE Outstanding Leadership Award, Last Engineer Standing Competition Winner (2nd place)
- **Relevant Courses:** Economics, Chemical Laboratory Methods, Introduction to Circuits, Calculus I–IV, Physics I & II, Thermodynamics

PROFESSIONAL EXPERIENCE

Nexus Engineering Group – *Engineering Consulting Intern* | Cleveland, OH **Summer 2025, 09/2023 – 05/2024**

- Assisted Process Team for 40 hours per week with 15+ projects for clients in the renewable energy, oil/refining, and chemical manufacturing sectors
- Recognized for key achievements including: reviewing and organizing 250+ isometric drawings to build an accurate hydraulic model, categorizing thousands of mechanical parts in Excel, assembling 15 multi-component document packages, and completing 10 pressure safety valve (PSV) pressure drop calculations for a renewable energy plant
- Learned how time and resources drive engineering outcomes for multi-million dollar projects

Manhattan SC – *Soccer Coach* | New York, NY **05/2021 – Current**

- Manages conflicts, coordinates large groups of up to 30, and adapts to unpredictable circumstances while teaching children ages 6-15 soccer fundamentals

NBC News – *TODAY Show Production Assistant/Runner* | Paris, France **07/2024 – 08/2024**

- Transported Olympic athletes and TODAY talent around Paris; communicated their whereabouts and ensured timely arrivals on set
- Secured props, organized more than 50 American fans on Trocadero Plaza for live coverage, and assisted TODAY producers and crew with live broadcasts and taped segments
- Connected Olympic medalist Stephen Nedoroscik, a men's gymnast, with a young American fan who shared the same rare eye condition as him (coloboma). Pitched the story to NBC, a moment that ultimately made national news headlines (including coverage in People Magazine)

E3 Scholars – *Academic Tutor* | New York, NY **05/2022 – 09/2023**

- Helped high school students learn and understand Calculus I and Chemistry coursework via Zoom

Starbucks – *Barista* | New York, NY **05/2023 – 08/2024**

- Ensured customer satisfaction, crafted high quality beverages, and maintained store cleanliness

LEADERSHIP & COMMUNITY DEVELOPMENT

Make-A-Play Foundation (MAP) – *Winter Fellow (Phase 1)* | Remote **January 2025 – Present**

- Selected to participate in Phase 1 of an exclusive fellowship for high-achieving college athletes. Competes against 200+ others in weekly mock interviews to proactively implement learnings from 3 modules + ~10 hours of instruction on behavioral/technical/hybrid interview preparation
- Learning how to transform student-athlete experience into a successful post-playing career at a leading company

Varsity Women's Soccer – *Student-Athlete* | New York, NY & Cleveland, OH **08/2021 – Current**

- Devotes 30-40 hours per week to practices, competition, injury rehabilitation, and team meetings while balancing a full academic course load
- Walked-on to Columbia's Women's Soccer Team; currently serves as the team's mental health representative
- Helped Case Western Women's Soccer achieve its three most successful seasons in program history, including NCAA National Championship runner-up in 2022
- Persevering through injuries while mentoring younger players and fostering a positive team environment

American Institute of Chemical Engineers (AIChE) – *President* | Cleveland, OH **04/2023 – 05/2024**

- Led biweekly executive board meetings. Managed an annual budget of \$8,000 to plan, organize, and delegate work for 50+ person events such as the Adler Banquet, AIChE Holiday Party, and Fall Social
- Expanded engagement with underclassmen as well as other Case Western engineering clubs and fraternities through organizing mixers

Civic Center For Engagement and Learning (CCEL) – *CCEL Scholar* | Cleveland, OH **08/2021 – 05/2023**

- Honors students with outstanding commitment to civic engagement; requires 30+ hours of volunteering each academic year
- Mentored and developed meaningful relationships with underprivileged Cleveland highschoolers through weekly meetings

NON-TECHNICAL SKILLS & INTERESTS

- **Skills:** Microsoft Office, Excel, Aspen HYSYS, Navisworks, Bluebeam Revu, AFT Fathom, Matlab, & RStudio
- **Programs:** Wall Street Trek (faculty-selected for introductory program to careers in business and finance)
- **Interests:** Soccer, Sports, Travel, Restaurants, Baking, Thrifting, Long Walks, New Experiences

SYDNEY A. LU

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EDUCATION

Harvard University – Cambridge, MA

GPA: 3.72/4.0

B.A. in Applied Math Economics | Minor in Government | ACT: 33

Anticipated Graduation: May 2026

- **Accomplishments:** NCAA Division I Student-Athlete (Swimming & Diving); All-Ivy League First Team (400M Medley Relay); All-Ivy League Second Team (100 Fly, 800 Free Relay); Competed at the U.S. Olympic Trials in 2021, Winning the B Final in the 100 Butterfly
- **Relevant Courses:** Microeconomics, Government, Mathematics
- **Wall Street Prep Education by 2024:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

EXPERIENCE

Arctos Sports Partners – *Incoming Investment Banking Student Analyst* | New York, NY (Remote)

December 2023

- Expected to collaborate with a 6-person team to evaluate the strategic rationale and impact of acquiring a stake in the New England Patriots
- Expected to build an Income Statement, Balance Sheet & Cash Flow Statement in the absence of public financials to gauge financial health
- Expected to perform due diligence by examining the Patriots' financial history & profile to reveal essential insights on success probabilities

Bank of America – *Equity Research Student Analyst (Team Mariel Siebert)* | Remote

September 2023 – November 2023

- Led the “execution” of a 5-week project for Bank of America's Equity Division, collaborating with a team of 4 and BofA mentor, [Jawad Khan](#), to author an investment thesis for defense stocks as a viable investment for a client seeking the best portfolio of stocks in 2023
- Produced an investment thesis that identified underlying catalysts, outlined the client's risk/reward profile & forecasted potential returns

Morgan Stanley – *Fixed Income Student Analyst; Risk (Team Martha de la Torre)* | Remote

April 2023 – June 2023

- Selected to participate in an invite-only case competition with Morgan Stanley's Fixed Income Division, developing an investment thesis for MD, Stephen Dance, to recommend the best asset for a client to invest in through '23 (i.e., treasuries, equities, investment grade credit)
- Created a color-coded risk assessment matrix to define the varying risk levels associated with recommending a new asset class to a client, specifically considering downsides/headwinds in my 5-person scrum team's investment thesis & consolidating risks into a single chart
- Produced a profit target in Microsoft Excel to provide a clear idea of profit potential versus how much our team's client might potentially lose when investing in our asset, supplementing our spreadsheet with a 4-step mitigation strategy to avoid/reduce/transfer/accept all risks

The Borgen Project – *Regional Director* | Remote

January 2021 – March 2022

- Coordinated a local fundraising initiative by delivering presentations on anti-poverty foreign policy bills to the World Bank Group and the Bill and Melinda Gates Foundation, resulting in ~\$5,000 in donations
- Managed foreign policy initiatives, utilizing social media to spread publicity, prompting the mobilization of 200+ constituents in one week
- Oversaw trainee programs and implemented new project management approaches, creating a more expanded/collaborative internship base

Promoting Leadership in Aspiring Youth (PLAY) – *Youth Counselor and Head Academic Tutor* | Dublin, CA

March 2019 – March 2022

- Chaired the PLAY Foundation board as a youth counselor, contributing to the development of several in-person engineering and science learning camps for children in elementary school as well as the eventual availability of virtual programs during the COVID-19 pandemic
- Taught 6 foster children as the leading Head Tutor in various subjects, including Calculus, English, and History, helping them gain confidence in the classroom & increase academic GPA levels, earning the Presidential Volunteer Gold Award for 100+ hours of service

LEADERSHIP & COMMUNITY DEVELOPMENT

Pleasanton Seahawks Swim Team – Team Captain | Pleasanton, CA

September 2020 – August 2022

- Led a county-wide effort to petition city governments to reopen pools on the basis of prioritizing both the physical and mental health of swimmers, resulting in over 1,000 signatures and the subsequent reintroduction of aquatic centers to the community
- Facilitated a healthy team environment and culture through leading daily pre-practice team exercises and biweekly post-swimming conditioning circuits, catalyzing the achievement of four conference titles in two years, including three at the Far Western Championships
- Contributed to team conference titles by obtaining the high point swimmer award at three of the four championships and attending the U.S. Olympic Trials representing the Pleasanton Seahawks and winning the B-Final heat in the 100 butterfly

WaterWish Foundation – Co-Founder | Oakland, CA

August 2013 – August 2022

- Managed and created WaterWish Foundation, an institution focused on advocating for water safety in economically disadvantaged areas
- Planned and fundraised for the organization through social platforms, a promotion at swim practices and competitions, and ultimately collecting and donating over 4,000 pairs of goggles to low-income communities
- Communicated with local institutions (i.e., Oakland YMCA) to organize charity events & directly oversaw donations to the underprivileged

The African Library Project – Book Drive Coordinator | Remote

June 2020 – June 2021

- Directed a charity initiative via online media marketing techniques and campaign events centered on aiding literacy in African communities, resulting in the collection, sorting, and shipment of 8,000+ books
- Headed fundraising procedures for the shipment of donated books to African countries by leading speaker events at local high schools and swimming teams, accumulating donations amounting to \$1,000+
- Awarded the Gold Literacy Award for donating enough books to build libraries in five different African nations, including Malawi, Botswana, Uganda, Lesotho, and Ghana

Pacific Swimming Association – Senior Athlete Representative; Swimming Team Captain | Pleasanton, CA

August 2016 – August 2018

- Chaired the Pleasanton Seahawks Athlete Representative position on the Pacific Swimming board, advocating for swimmers' rights and the establishment of more inclusive policies for low-income households, including a ban on technical racing suits for athletes 12 and under
- Campaigned as a Senior Athlete representative on the Board of Directors and Head Swimming Offices for the Pacific Swimming Zone, contributing to the implementation of diversity, age-group, and all-star programs
- Mentored and successfully transitioned the Senior Athlete Representative role to a younger generation of swimmers in order to focus on new responsibilities as Team Captain of the Pleasanton Seahawks Senior Elite training group

NON-TECHNICAL SKILLS & INTERESTS

- **Interests:** Surfing, Running, Hiking, Reading, Traveling, Seizing new opportunities as the first-generation daughter of immigrants.

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EDUCATION

Amherst College – Amherst, MA

GPA: 3.77/4.0

B.A. in Economics & Biochemistry | SAT: 1530

Anticipated Graduation: May 2026

- **Accomplishments:** NCAA Division III Student Athlete; MAP x Morgan Stanley First-Year Fixed Income Scholar
- **Relevant Courses:** Introduction to Economics, Statistical Analysis, Introduction to Computer Science, Probability, Microeconomics
- **Wall Street Prep Education by 2024:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

EXPERIENCE

Warburg Pincus – *Investment Banking Student Analyst* | New York, NY (Remote)

January 2024 – Present

- Advised Warburg on the potential acquisition of a small HVAC company, specifically tasked with building my team's balance sheet organized by assets (current assets, property/plant/energy, intangible assets) & liabilities (current liabilities, long-term liabilities, equity)
- Forecasted 5+ potential assumptions to guide the team on ways to strengthen our business, including: (1) Revenue Growth Rate; (2) Costs of Goods Sold; (3) Gross Margins; (4) Operation Expenses; (5) EBITDA Margin; (6) Capital Expenditures; and (7) Debt Financing
- Consolidated team's balance sheet + assumptions into 2 PowerPoint slides to present the execution phase of the project to Warburg leaders

Morgan Stanley – *Fixed Income Student Analyst; Investments (Team Mellody Hobson)* | Remote

April 2023 – June 2023

- Selected to participate in an invite-only case competition with Morgan Stanley's Fixed Income Division, developing an investment thesis for MD, Stephen Dance, to recommend the best asset for a client to invest in through '23 (i.e., treasuries, equities, investment grade credit)
- Created a color-coded risk assessment matrix to define the varying risk levels associated with recommending a new asset class to a client, specifically considering downsides/headwinds in my 5-person scrum team's investment thesis & consolidating risks into a single chart
- Produced a profit target in Microsoft Excel to provide a clear idea of profit potential versus how much our team's client might potentially lose when investing in our asset, supplementing our spreadsheet with a 4-step mitigation strategy to avoid/reduce/transfer/accept all risks
- Updated and actively monitored the team's project management workflow on Air Table, "owning" the monitoring phase of the project, streamlining the process of achieving goals by completing all deliverables 2 weeks ahead of schedule (i.e., risk assessment, profit target)

The Office of Finance Management for the National Institute of Health – *Student Trainee* | Bethesda, MD

June 2021 – August 2022

- Streamlined communication processes between 27 NIH Institutes & the Office of Finance Management, leading to faster fiscal transactions
- Monitored and documented vendor transactions across 27 NIH Institutes, expediting the end-of-year review process
- Proactively managed NIH vendor sites to reactivate dormant vendor accounts, ensuring immediate institute access upon request

Dr. Komkov Ph.D. of Sandia Laboratories – *Lab Assistant* | Remote

June 2021 – November 2021

- Collaborated with Dr. Komkov of Sandia Laboratories to develop a program that uses a complex neural network system to accurately detect diseased retinas with over 90% accuracy
- Enhanced the program's accuracy by integrating fabricated training data of rotated and brightened images, resulting in a 10% improvement in detection rates
- Optimized the program's performance by cleaning up the original retina dataset to minimize potential errors

LEADERSHIP & COMMUNITY DEVELOPMENT

Amherst College Varsity Swimming & Diving – Student Athlete | Amherst, MA

August 2022 – Present

- Commit 20+ hours a week to training, meets, travel, film sessions, individual/team meetings, community service
- Led a six-member board of teammates, appointed by the coach, to identify issues affecting team dynamics and develop an action plan to foster a positive team culture
- Coordinate team-building events outside of practice, fostering strong team chemistry + a sense of shared investment in each other's success

Montgomery Blair High School Varsity Swimming & Diving – Captain | Silver Spring, MD

August 2021 – June 2022

- Developed and implemented successful practice strategies throughout the season, culminating in the team's promotion from Division I to Division II in Maryland - a first-time achievement for the team
- Mentored and supported underclassmen teammates, empowering them to perform under pressure and feel confident in their abilities
- Appointed team captains for the following season, ensuring continuity and continued success

Financial Literacy Club (Montgomery Blair High School) – Co-Founder | Silver Spring, MD

August 2020 – June 2022

- Designed lecture slides for an English to Speakers of Other Languages (ESOL) teacher to incorporate basic financial literacy skills into their instruction, helping students develop essential financial competencies
- Advocated for financial literacy to be included in the school's curriculum, spearheading a successful campaign that resulted in the creation of a new elective course in this subject area
- Provided training in basic financial literacy to members of our club, empowering them with financial knowledge and skills as they prepare to transition into adulthood

ACES University of Maryland – Assistant | Shady Grove, MD

August 2019 – September 2019

- Recruited high school seniors from across Maryland to participate in the University of Maryland's medical program, introducing them to the field of medicine and inspiring their academic and career aspirations
- Assisted a physician in running a laboratory for prospective students, enabling them to gain insights into new and exciting medical mechanisms and practices
- Guided students in conducting an experiment to explore the limitations of basic soap, fostering their curiosity and critical thinking skills

NON-TECHNICAL SKILLS & INTERESTS

- **Interests:** Sports Medicine, Sport Performance, Basketball, Statistics.

SARA “VALENTINA” CRUZ

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EDUCATION

Dartmouth College – B.A. in Economics – June 2026

GPA: 3.81/4.0

- **Accomplishments:** NCAA Student-Athlete (Dartmouth Women’s Tennis); 2022-2023 Intercollegiate Tennis Association Scholar Athlete
- **Relevant Courses:** The Price System, Essential Math for Economic Analysis, Macroeconomics, Introduction to Statistical Methods, The Economics of Financial Intermediaries and Markets (Winter 2024), International Trade (Winter 2024), Computer Science 1 (Spring 2024)

EXPERIENCE

Bank of America – *Equity Research Student Analyst (Team Mariel Siebert)* | Remote

October 2023 – Present

- Leading the “control phase” of a 5-week project for Bank of America’s Equity Division, collaborating with my team’s mentor, [Jawad Khan](#), to choose the best portfolio of stocks for my team’s clients to allocate their money into until the end of the year (min. of 3 securities)

Office of Residential Life — *Undergraduate Advisor* | Dartmouth College, Hanover, NH

August 2023 – Present

- Foster a supportive community within the dormitory, ensuring the well-being and safety of 40 residents
- Create four engaging programs/events per term that encourage positive interactions, personal growth, and inclusivity
- Effectively address and resolve conflicts, demonstrating strong interpersonal and communication skills
- Collaborate with a diverse team of advisors to ensure a cohesive and harmonious living environment

MC Surfaces Inc. — *Accounting Intern* | Houston, TX

July 2023 – August 2023

- Applied quantitative methodologies to meticulously review and validate purchase orders, invoices, and accounts payable
- Managed accounting processes using Excel and Sage software to compile and analyze financial data
- Managed inventory allocation procedures for precise tracking, minimizing stock discrepancies and improving supply chain efficiency
- Collaborated closely with cross-functional teams to verify purchase details, resolve discrepancies, and facilitate timely vendor payments

Department of Spanish, Dartmouth College — *Spanish Teaching Assistant* | Part-time | Hanover, NH

March 2023 – June 2023

- Conducted systematic, meaningful, & communicative drill exercises for groups of 4-5 students, resulting in improved student performance
- Enhanced student learning by optimizing a wide range of instructional approaches and innovative classroom activities
- Facilitated and moderated classroom discussions 3x a week with interactive, student-centered learning
- Collaborated closely with the Dartmouth Faculty for the implementation and improvement of the Spanish curriculum

DICK’S Sporting Goods (DSG) — *Financial Student Fellow* | Remote

January 2023 – March 2023

- Designed a national marketing campaign to promote DSG’s products to 100K+ new female customers for Women’s History Month in 2023
- Owned the ‘monitor phase,’ managing a **\$3.5M budget**, earmarking funds for direct (5+ quality creative assets) & indirect costs (personnel)
- Led benchmark analysis to compare spend rationalization against DSG female-focused initiatives:
 - **Good Sports:** audited a \$100k grant by DSG to distribute sports bras to under-resourced female athletes across the U.S. in 2021
 - **U.S. Girls Running Programs:** audited a \$500k grant by DSG to support under-resourced girls’ running programs in 2021

Dartmouth Leadership Attitudes and Behaviors Program (D-Lab) – *D-Lab Mentee* | Hanover, NH

January 2023 – March 2023

- Initiated conversation in small group discussions to understand the relationship between leadership and personal values
- Engaged in experiential, group activities to master core management and leadership skills
- Identified strengths and areas of needed growth to work effectively with others through cumulative self-reflection exercises

Buddy Up Tennis — *Tennis and Fitness Coach* | West Lebanon, NH

September 2022

- Collaborated with the tennis team to organize and lead tennis practices for children with Down Syndrome
- Demonstrated interpersonal skills, fostering teamwork and an inclusive environment of mutual support and achievement

LEADERSHIP & COMMUNITY DEVELOPMENT

Warburg Pincus – MAP Elite 100 Investment Fellow | Remote

November 2023 – Present

- Selected as 1 of 100 second-year athletes to participate in a five-part fellowship designed to prepare BIPOC students for careers in banking
- Receive 20+ hours of virtual instruction in accounting, technical interview preparation & industry-specific training for future banking roles

Habitat for Humanity – Volunteer | Hanover, NH

January 2023 – Present

- Help build residential units for low-income families from foundation to finish, including framing walls & installing windows and doors
- Communicate with the volunteer coordinator and site supervisor to ensure that organizational standards and expectations are met

Dartmouth Varsity Women’s Tennis – NCAA Division I Student-Athlete | Hanover, NH

September 2022 – Present

- Devote 25+ hours a week to: practice/training, film sessions, individual and team meetings, games, tutoring, travel, and community service
- Develop a results-oriented focus & skills in: communication, critical thinking, accountability, resiliency, teamwork, and time management

Credit Suisse – Market Madness Stock Pitch Participant | Remote

March 2023 – March 2023

- Collaborated with a team of 3 to virtually pitch a stock of our choice to members of Credit Suisse’s Equity Research and Markets teams
- Learned what it is like to work in Global Markets at Credit Suisse, while networking with research analysts, salespeople, and traders

TECHNICAL SKILLS

- **Performance Management:** created a KPI framework with business objectives & S.M.A.R.T. metrics for DSG
- **Accounts Payable:** processed payments and expenditures, including purchase orders, PO receipts, and invoices
- **Project Management Professional (PMP) Training:** controlled a 5-week project for DSG using [Monday.com](#)
- **Microsoft Office:** Word, Excel, PowerPoint, Teams
- **Sage accounting:** utilized to manage accounting processes
- **Scrum Methodology:** collaborated with a scrum team of 6 athletes to create a multi-year marketing strategy for DSG
- **Spanish:** native speaker / **Italian:** conversational

INTERESTS/CLUBS: Smart Women in Securities

WINTA W. TEWOLDE

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EDUCATION

Columbia University – New York, NY

GPA: 4.12/4.0

B.A. in Economics

Anticipated Graduation: May 2025

- **Accomplishments:** NCAA Division I Student-Athlete (Columbia University Women's Tennis); Dean's List (Fall 2021 – Present)
Columbia University Student-Athlete Advisory Committee (Active Member); Black Student Athlete Association (Active Member)
- **Relevant Courses:** Calc-Based Statistics, Global Economy, Intermediate Macroeconomics/Microeconomics, Principles of Economics
- **Industry Education:** Building a Financial Model, Core Data Analysis, Core Financial Concepts, Finance Interview Prep, Valuation 1: DCF
- **Leadership Events:** Participated in Leadership Events with Bank of America, Deloitte, Evercore, Oliver Wyman & JP Morgan Chase & Co.

EXPERIENCE

DICK'S Sporting Goods – *Compliance, Risk & Advisory Student Consultant* | Remote

01/2023 – 03/2023

- Designed a national marketing campaign to promote DSG's products to 100K+ new female customers for Women's History Month in 2023
- Owned the 'monitor phase,' creating a risk assessment matrix to define varying risk levels color-coded by severity (i.e., low risk → green)
- Developed a KPI framework with 5+ S.M.A.R.T. business metrics & synthesized findings from research into a cohesive roadmap for DSG
- Coordinated a communication strategy to ensure: (1) high-level awareness of the plan; and (2) anchor changes into DSG's company culture
 - **ADKAR:** applied ADKAR assessment to build Awareness/Desire/Knowledge/Ability/Reinforcement of the plan with employees
 - **Lewin's 3-Stage Model:** evaluated 3 stages (freeze, change, refreeze) to communicate the logic behind the female-focused plan

Dembe Sembel Tennis Program – *Tutor & Coach* | Dembe Sembel, Eritrea

06/2022 – 08/2022

- Coached 5+ Eritrean girls aged 13-15 in a traditional society that provides women with limited resources an opportunity to play sports
- Tutored and mentored said girls (native Tigrinya speakers) on a daily basis to improve their vocational English-speaking skills
- Collaborated with the Eritrea Tennis Federation to organize the provision of new racquets and balls to the Eritrean tennis community

Peninsula Tennis Club – *Tennis Coach & Instructor* | San Diego, CA

08/2022 – 09/2022

- Taught a tennis clinic 20+ amateur athletes 2x per week, leveraging experience as a college athlete to help them improve their games
- Managed 5 assistant coaches to assist in training, allotting them each with a few clients and providing them with drills to feed our clients
- Led clients to tremendous improvements in a month, receiving positive feedback about coaching style & requests to keep the clinic running

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – *Women's Playmaker '23 (Team Debi Thomas)* | Remote

09/2022 – Present

- Selected as 1 of only 120 college women athletes to participate in a two-month fellowship to prepare for careers in competitive industries
- Analyze business challenges through systematic problem-solving frameworks (ADKAR, DMAIC, MECE, MEDDIC, PESTEL, SWOT)
- Manage a portfolio of complex initiatives required to consult several Fortune 500 companies with a cross-functional case team of 6 athletes
- Collaborated with a scrum team of 5 to develop a multi-year strategy for DSG's Women's History Month initiative with a 5-week timeline
 - Technical Skills Acquired: Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development

Student-Athlete Advisory Committee (Columbia Chapter) – *Team Representative* | New York, NY

09/2021 – Present

- Appointed as 1 of 60 student athletes nominated by coaches out of 750+ candidates to serve as a liaison to the athletic department, regularly meeting every other week to discuss upcoming events to help students-athletes have a better collegiate experience on and off the field
- Hosted virtual networking events to connect alumni working in film and television with 75 students looking to possibly pursue a career in the film, media, or entertainment industry, helping them learn the steps necessary to enter a slightly more difficult & less linear career path
- Fostered & led communication between the administration & all 31 varsity sports programs, creating an open & collaborative environment

Columbia Women's Tennis Team – *NCAA Division I Student-Athlete* | New York, NY

09/2021 – Present

- Handled approximately 35+ hours per week of practice, competition, service, and travel while balancing a full academic course load
- Won doubles match to clinch the team's doubles point against the U. Michigan (a top 20 school), serving two aces in the final game to win
- Liaised between the Columbia Women's tennis team and the Women's Tennis Head Coach, communicating with my teammates on what they feel needs to improve in practice and later initiating meetings with my Coach to discuss ways to implement these improvements

San Diego Eritrean Community – *Feed the Homeless Volunteer* | San Diego, CA

07/2021 – 08/2021

- Planned and actively managed an event with the San Diego Eritrean community to feed 100+ homeless people downtown San Diego
- Distributed food and water to the homeless, canvassing street by street to feed as many people-in need as possible for an entire month
- Volunteered 20+ hours of service to feed the homeless & personalized strategy to help our group distribute meals in the most efficient way

Personal Tennis Clinic – *Coach/Mentor* | La Mesa, CA

04/2021 – 05/2021

- Conducted a tennis clinic for lower-income, black elementary students to help them pursue their passion in an expensive sport, growing the program from 5 to 20 clients in just a month's span & helping attract, engage, and retain a new generation of diverse tennis athletes
- Planned and managed 30 different practice sessions by providing my own equipment, ultimately creating a space for these young children to enjoy tennis and improve their skills without the fear of not being able to afford equipment or rent courts for practice time
- Volunteered 7+ hours of service/week to work with the students in the program first-hand, customizing personal plans to help them achieve their tennis goals, allowing each student to play the game of tennis free of charge and feel more confident about their game(s)