

Abra P. Richmond

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EDUCATION

Princeton University – Princeton, NJ

Expected Graduation: May 2028

Bachelor of Arts, Economics

Cumulative GPA: 3.47/4.0

Accomplishments: NCAA D1 Student-Athlete (Princeton Varsity Women's Golf), Second-Team All-Ivy (2025), Toyota Tour Cup Champion (2023)

Relevant Coursework: ECO 101 (Intro to Macroeconomics), ECO 100 (Intro to Microeconomics), ECO 300 (Microeconomics), MAT 103 (Calculus), SML 201 Intro to Data Science), SOC 101 (Intro to Sociology), Wall Street Prep: Accounting & Financial Statement Analysis Certification

Organizations: Princeton Women in Business (*Member*), Princeton Women in Economics and Policy (*Member*), Scholars of Finance (*Public Relations Lead*), Women's Club Soccer (*Goalie*), Make-A-Play Foundation (*MAP Diamond League Investments Fellow '25*), Sixth Street (*Early Insights Program Participant*)

PROFESSIONAL EXPERIENCE

Palo Alto Investors

Palo Alto, CA

Incoming Summer 2026 Intern

Summer 2026

- Selected as 1 of 25 candidates for a competitive, one-week executive internship focused on public-market investing
- Expected to engage in daily investment discussions led by founders and senior leaders from top investment firms across multiple industries
- Expected to participate in applied investment exercises, strengthening analytical thinking/judgment/professional communication in a buy-side setting

Oliver Wyman

Remote

Incoming MAP Management Consulting Fellow

Jan 2026

- Expected to collaborate with a case team of ~5 student consultants to develop a consulting strategy to reduce wait times, improve patient flow, and solve workforce burnout by reimagining hospital operations through automation, workflow redesign, and tech-enabled care delivery

Athlete to Athlete

Remote

Mentor

Jul 2025 – Present

- Establish meaningful relationships with student-athletes, providing consistent mentorship & guidance throughout their athletic and personal growth
- Deliver individualized feedback on mentee progress, identifying areas for improvement and growth through structured check-ins
- Support mentees in building personal and professional skills through goal setting, accountability, and ongoing coaching

Guggenheim Securities

Remote

MAP Investment Banking Fellow

Sep 2025 – Dec 2025

Selected Transaction Experience

- EcoEnclose — ~\$30M+ *Implied Enterprise Value (Sustainable Packaging / Consumer & Retail Acquisition Simulation)*
 - Owned the Control Phase by pressure-testing the investment thesis for **EcoEnclose**, articulating 3 data-backed reasons to acquire the company now—[1] ESG-driven demand, [2] regulatory lock-in (EPR/PCR mandates) + [3] authentic sustainability moat—to assess conviction
 - Constructed the “why now” urgency case by linking near-term catalysts including compressed SMID-cap valuations, accelerating ESG regulation across U.S. states and Europe, and tightening recycled-input supply, framing a time-sensitive entry window critical to underwriting
 - Stress-tested execution, margin, and supply-chain risks by quantifying downside sensitivity to recycled-feedstock volatility and scale-up complexity, informing mitigation strategies reviewed live by Guggenheim Consumer & Retail analysts [Grace Gozdecki](#) and [Payton Ahola](#)
 - Re-validated valuation logic by challenging EV/Revenue (1.4–2.0× entry; 2.5–3.5× exit) and margin-expansion assumptions (+700 bps EBITDA uplift), confirming defensibility of a \$30M+ exit scenario under conservative multiple and cost-pressure cases

Descanso Gardens – Princeton Internship in Civic Service

LaCanada, CA

PICS Intern

Jun 2025 – Aug 2025

- Served as liaison across communication, education, horticulture, and finance teams, coordinating cross-functional execution on multiple projects
- Developed a project website and magazine feature to communicate insights from the wild game camera initiative to external audiences
- Organized and cataloged 100,000+ images in Excel into a searchable database by animal type, image quality, and metadata for efficient access

EXTRACURRICULARS

Princeton University Women's Golf Team

Princeton, NJ

Varsity Athlete

Aug 2024 – Present

- Commit 25+ hours per week to Division I training, competition, travel, and performance analysis while managing a rigorous academic course load
- Compete at the Ivy League level, earning Second-Team All-Ivy (2025) honors with three Top-10 finishes in 10 events & a 74.6 season stroke average
- Deliver consistent performance in high-pressure, multi-round tournaments, including a runner-up finish at the Nittany Lion Invitational (-2) and 5th place at the Ivy League Championship (+2)

Wall Street Prep — Accounting & Financial Statement Analysis Certificate

Remote

Student

Oct 2025 – Dec 2025

- Completed 20+ hours of rigorous accounting and financial statement analysis training covering 10-Ks, 10-Qs, income statement, balance sheet, cash flow statement, and ratio analysis, earning a 92/100 on the final Accounting Crash Course exam, demonstrating strong accounting fundamentals

SKILLS & INTERESTS

Language(s): Fluent in French and English

Programs: VBA, Microsoft Excel, Microsoft PowerPoint

Interests: WNBA, F1, baking, space, fantasy, and science fiction media

Albert Hu

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EDUCATION

Amherst College, Amherst, MA | *Bachelor of Arts in Economics and Statistics* **Expected May 2028**

- GPA: 4.0/4.0
- Relevant Coursework: Linear Algebra, Multivariable Calculus, Data Science, Introduction to Economics

Great Neck South High School, Great Neck, NY | *High School Diploma* **Sept 2020 – June 2024**

- GPA: 96/100, SAT: 1570/1600
- Achievements: National Merit Semifinalist, AP Scholar with Distinction, 3x All-State Tennis

PROFESSIONAL EXPERIENCES

Self Employed, Great Neck, NY | *Tennis Instructor and Hitter* **June 2022 – Present**

- Developed 10+ young junior tennis players, tailoring drills, advice, and teachings to individual needs and abilities.
- Designed training programs focused on technique, footwork, and mental resilience, promoting player growth.
- Arranged scheduling for 10-15 lessons a week, optimizing flexibility and efficiency to accommodate different clients.

Schoolhouse.world, Remote | *SAT Tutor* **June 2023 – August 2023**

- Mentored 10 diverse high school students nationwide, increasing SAT Math scores by at least 55 points on average.
- Presented students with many problem-solving methods, time management skills, and critical-thinking procedures.
- Communicated effectively to ensure a collaborative environment, adapting teachings to different learning styles.

Great Neck Youth Tennis Club, Great Neck, NY | *Volunteer Services Officer* **Sept 2020 – June 2022**

- Managed administrative tasks related to club operations, such as scheduling tennis events and handling logistics.
- Instructed beginner tennis to 20+ kids throughout the local community, refining teaching and interpersonal skills.
- Trained staff coaches, equipping them with drills and experience to improve their ability to guide young players.

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

Amherst College Men's Varsity Tennis Team, Amherst, MA | *Athlete* **Sept 2024 – Present**

- Competed on the varsity tennis team, displaying commitment towards improving as both a player and teammate.
- Cultivated exceptional teamwork, communication, and leadership skills during practices and collegiate matches.
- Dedicated 20+ hours weekly to practice, lifting, matches, and film analysis on a team ranked as high as #9 nationally.

Scholars of Finance, Amherst, MA | *Member* **Sept 2024 – Present**

- Attended events featuring industry professionals, gaining insights into financial markets and corporate leadership.
- Participated in the Leadership Development Program (LDP), enhancing discipline, integrity, and financial ethics skills.
- Collaborated with peers in cohort-based discussions focused on responsible investing and upholding moral values.

Make-A-Play Foundation (MAP), Remote | *Spring Fellow (Phase 1)* **Sept 2024 – Present**

- Engaged in Phase 1 of a fellowship for college athletes, competing against 200+ others in weekly mock interviews.
- Analyzed mock interview results weekly, dissecting the personalized feedback to make improvements for the future.
- Attended virtual recruiting events with MAP's partners, preparing for a post-athletic career at a leading company.

South High School Service Club, Great Neck, NY | *Organizer and Coaching Leader* **Sept 2021 – June 2024**

- Served as head coach and taught individuals with Autism tennis drills, fostering an interactive learning experience.
- Oversaw numerous service club events such as bake sales and teacher talent shows, raising over \$5,000 for the club.
- Contributed 100+ hours towards expanding community engagement and creating opportunities for those in need.

Great Neck South High School Boy's Varsity Tennis Team, Great Neck, NY | *Captain* **Sept 2020 – June 2023**

- Qualified for the NY State Singles Championships 3 years in a row while consistently facing top-ranked opponents.
- Played #1 singles, guiding the team to one Nassau County quarterfinal and two consecutive semifinal appearances.
- Motivated teammates by giving speeches and leading by example, encouraging a resilient and driven team culture.

SKILLS & INTERESTS

Languages: English (Fluent), Mandarin (Conversational), Spanish (Basic)

Technical Skills: Python (Beginner), Java (Advanced), R (Moderate), C++ (Moderate), Microsoft Excel (Beginner)

Interests: Tennis (Roger Federer), Soccer (Lionel Messi), Basketball, Hiking, Traveling, Video Games, TV Shows

ALEXIS A. WILLIAMS

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EDUCATION

University of Pennsylvania | The Wharton School – Philadelphia, PA

GPA: 3.7/4.0

B.S. in Economics | Concentration in Finance

Anticipated Graduation: May 2028

- Varsity Student Athlete: Women's Field Hockey
- Accomplishments: University of Pennsylvania's Scholars of Finance Program | Office of Investments Emerging Leaders Program | Penn Athletics Wharton Leadership Academy
- Relevant Courses: Calculus, Economics, Marketing, Management, Accounting, Finance, Critical Writing Seminar, Finance, Accounting

PROFESSIONAL EXPERIENCE

Northrop Grumman – *Finance Accounting Intern* | Redondo Beach, CA

05/2025 – Present

- Utilized software to compile and generate reports, statistics, models, tables, graphs, correspondence, and presentations

Onlife Fitness – *Kids Club Associate* | McLean, VA

03/2024 – 08/2024

- Communicated with parents and team members to support each child's needs and maintain a clean, welcoming space
- Supervised and engaged children in fun, age-appropriate activities to ensure a safe and enjoyable environment

Donaldson Run Recreation Association – *Lifeguard* | Arlington, VA

05/2023 – 08/2024

- Supervised swimmers and administered first aid/lifesaving rescues to ensure patron safety
- Led opening and closing procedures by assigning tasks to fellow lifeguards ensuring facility organization and safety

Beyond Sticks – *Head Field Hockey Coach* | Arlington, VA

09/2020 – 08/2024

- Collaborated with other head coaches to create appropriate practice plans aligning with weekly themes and skills
- Drove players to success in developing their field hockey skills and preparing for gameplay
- Refereed games, educated players, and promoted fair game practices

Nottingham Kids Summer Camp – *Entrepreneur and Director* | Arlington, VA

06/2020 – Present

- Founded and directed a children's summer camp generating approximately \$6,000 in weekly revenue for 5 consecutive summers, overseeing all operational aspects
- Managed employees, handled revenue and expenses, and ensured smooth day-to-day operations
- Utilized a diverse network and social media platforms (Nextdoor, Instagram, YouTube, TikTok) to strategically market the camp, driving year-over-year growth in enrollment and revenue

LEADERSHIP & COMMUNITY DEVELOPMENT

MAP x Morgan Stanley – *"Skills Challenge" Sales & Trading Fellow (Phase 1 & 2)* | Remote

03/2025 – Present

- **Phase 1:** Selected to participate in an exclusive 3-week interview preparation bootcamp for high-achieving college athletes, competing against 200+ others in 3 mock interviews sponsored by Morgan Stanley, achieving a score of 90%+ in all 3 interviews + earning a top spot on MAP's Leaderboard
- **Phase 2:** Qualified for Phase 2 of the fellowship based on strong performance in Phase 1 (90% or above), collaborating with a team of 6 to deliver an investment recommendation to Morgan Stanley's Fixed Income Team (i.e., Dan Lentz, Stephen Dance) using a 60/40 split between equity & fixed income for a client's \$1M retirement portfolio, supporting team by analyzing market fundamentals & performing technical research in the process

University of Pennsylvania Athletics – *NCAA Division 1 Student-Athlete* | Philadelphia, PA

08/2024 – Present

- Committed 20+ hours a week to practices, meetings, conditioning, and games during both fall and spring semesters
- Demonstrated leadership, teamwork, and resilience while maintaining a strong work ethic under pressure and in challenging situations

Powerplay Summer Camp – *Volunteer Counselor* | Arlington, VA

08/2022 – 08/2024

- Empowered children to build emotional resilience through activities aimed at teaching emotional acuity, stress management, and personal growth

Arlington Field Hockey – *Volunteer Head Coach* | Arlington, VA

03/2020 – 06/2024

- Led practices, created training schedules, and helped players build confidence on and off the field

High School Tutor – *Tutor* | Arlington, VA

01/2020 – 06/2024

- Provided tutoring support to high school students across various subjects, helping them improve academic performance and grasp challenging concepts

SKILLS & INTERESTS

- Technical Skills: Proficient in Microsoft Office Suite, Excel, PowerPoint, and various social media platforms
- Leader and social media manager of Yorktown High School's Model General Assembly Club and Youth Against Alzheimer's Club
- Communication: Excellent written and verbal communication skills, able to effectively convey ideas and collaborate with diverse teams
- Problem Solving: Strong analytical and creative thinking abilities, demonstrated through academic projects and extracurricular involvement
- Teamwork, Leadership, and Time Management: Proven ability to work in team-oriented environments and take initiative in leadership roles while competing in a year-round Varsity sport

ALICIA S. GUO

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EDUCATION

Harvard University — Cambridge, MA May 2028
B.S. in Economics | Minor in Computer Science

- **GPA: 3.9/4.0** | ACT: 35
- **Student-Athlete:** NCAA D1 Varsity Volleyball Player, Outside Hitter

Groton School — Groton, MA May 2024
• *Summa cum laude*

WORK EXPERIENCE

Primavera Capital Group - Private Equity Summer Analyst | Palo Alto, CA May 2025 – July 2025
Global private equity firm with investments in Asia and North America; \$20 billion AUM in PE, VC, and public equity

- Conducted market research, analyzed competitive landscapes, and identified value-creation strategies across consumer, renewable energy, and education sectors to assess control and buyout opportunities and support investment theses
- Performed due diligence on 4 potential investments, executed financial modeling and valuation analysis in Excel, and delivered notes and research to executives on 3 private equity deals

The Player's Club Golf Course - Business & Sales Intern | Beijing, China June 2024 – August 2024

- Spearheaded redesign and implementation of streamlined marketing strategies to enhance outreach, leveraging data analytics and member engagement tools to optimize communication with 1,000+ members
- Negotiated and secured \$500K+ in sponsorships and brand partnerships by conducting market research, preparing persuasive pitch decks, and engaging in bilingual (English & Mandarin) negotiations

Special Olympics Massachusetts - Officer | Boston, MA January 2019 – Present

- Lead strategic initiatives with Special Olympics leadership, organizing training sessions, coordinating volunteers, and securing community partnerships to promote inclusivity and expand access for athletes with intellectual disabilities

LEADERSHIP & EXTRACURRICULARS

Harvard Undergraduate Venture Capital Group - Associate | Cambridge, MA February 2025 – Present

- Lead and mentor analysts, reviewing 30+ investment memos and improving team output quality and efficiency by 10%
- Approve sourcing reports and directly influence investment theses as voting Investment Committee member
- Conduct in-depth market research and financial analysis on early-stage startups, connecting 500+ founders with 25+ top-tier VC firms (including Warburg Pincus, DCVC, F-Prime Capital) to expand overall qualified deal flow by 15%

Harvard Undergraduate Women In Business - Finance Committee | Cambridge, MA August 2025 – Present

- Manage financial operations, overseeing budgets, sponsor payments, and grants to secure funding for organization

Make-A-Play Foundation (MAP) - Pro Bowl Games & Winter Formula 1 Fellow | Remote January 2025 – Present

- Selected as 1 of 40 athletes (from 1,200+, top 3%) to compete in Pro Bowl, an elite, gamified IB tournament
- Collaborated with peers to advise a PE firm on a healthcare acquisition with Bank of America; completed 6 technical Scouting Reports through Wall Street Prep (Accounting, Valuation, DCF, LBO, M&A, Equity Value)

Harvard Financial Analyst Club - Investment Analyst | Cambridge, MA January 2025 – Present

- Conducted equity research on undervalued public companies using fundamental and technical analysis, and collaborated with analysts for stock pitches while engaging in HFAC's financial education programs

Groton School - Class President/Form Officer | Groton, MA September 2019 – June 2022

- Elected by peers 3 years in a row to represent grade at regular meetings with Groton faculty and Board of Trustees
- Advocated, collaborated with school Deans for weekly, hybrid community-building events under COVID protocols

ADDITIONAL INFORMATION

- **Languages:** Mandarin Chinese (native), Latin (AP Level)
- **Interests:** Acoustic guitar, Formula 1 Racing, Golf, Tennis, Oil painting, Snowboarding, Enthusiastic foodie on Beli
- **Work Eligibility:** U.S. Citizen - eligible to work in the U.S. with no restrictions

Amiya I. Stroumza

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EDUCATION

Stanford University – Stanford, CA

Bachelor of Science, Economics | Minors in Mathematics and Biology

Expected Graduation: May 2028

Cumulative GPA: 3.99/4.0

Accomplishments: Varsity Sailing Team Member, College National Champions (2024-2025)

Relevant Coursework: How Ventures Work, Economic Analysis, Topics in Health Economics, Programming Methods in JavaScript and Python, Linear Algebra, Multivariable Calculus, Accounting, Wall Street Prep: Accounting & Financial Statement Analysis Certification

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Dec 2025 – Present

Selected Transaction Experience

Confidential Emerging Healthcare Company — *To Be Selected (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*

- Own and lead the Execution Phase for a 5-person simulated BofA Healthcare deal team by building simplified 3-statement financials and 5-year projections, integrating peer-benchmarked revenue growth, margin expansion, and leverage assumptions to anchor valuation logic and pricing ranges
- Construct public comps (3–5 peers) and precedent transaction analyses (2–3 deals), evaluating EV, LTM/NTM revenue, EBITDA, margin profiles, and implied multiples to determine how target screens relative to Healthcare services, digital health & HCIT comparables across ~5 valuation buckets
- Design a banker-style Football Field chart synthesizing outputs from DCF, public comps, and precedent transactions, defining a defensible valuation midpoint while writing insight-driven takeaways that tie growth durability, operating leverage, and capital structure to valuation outcomes/positioning

SolAir

Founder & CEO

San Francisco, CA

Sep 2020 – Present

- Built the U.S. branch for Nomad Minus Virus®, the only cold-plasma pathogenic air-purification device validated by the Pasteur Institute against SARS-CoV-2, leading operations, distribution, and early market adoption across high-need customer segments
- Registered the California LLC, secured trademark protection, and implemented an Excel-based financial system to track import costs, shipping insurance, and payment-processing margins, improving visibility into unit economics and cash-flow accuracy

Stanford Graduate School of Business

Social Decision-Making Lab Research Assistant

Stanford, CA

Sep 2025 – Present

- Collaborated with PhD researchers to build a data-analytics framework analyzing 30+ hours of group-study recordings, extracting behavioral and linguistic patterns in negotiation dynamics to support experimental design, hypothesis testing, and publication-quality insights

Velocitek

Market Research Consultant

San Mateo, CA

Aug 2025 – Sep 2025

- Spearheaded Velocitek's first-ever industry expansion analysis for the RTK GPS Puck, evaluating high-growth verticals such as autonomous vehicles, commercial drones, and industrial robotics to identify market entry points, competitive pressure, and strategic fit
- Utilized PitchBook to analyze market caps, EBITDA profiles, and competitive landscapes of leading public companies across each vertical, compiling findings in Excel to assess industry saturation, unit-economics viability, and overall expansion potential

Gridspace

Summer Associate

Los Angeles, CA

May 2024 – Aug 2024

- Selected as Gridspace's youngest-ever Chief of Staff intern (previous hires exclusively GSB students), supporting executive operations and strengthening cross-team alignment on product, research, and customer-facing priorities
- Leveraged CRM tools including HubSpot and Salesforce to run usage analytics on the company's voice-AI API, producing a 60-use-case library with polished product descriptions, customer demos, and workflow recommendations for GTM teams
- Co-authored a Google technical blog detailing TPU training results, collaborating with engineers to translate model-performance improvements, training optimizations, and benchmarking insights into accessible, technically accurate content

UCSF Mattis Lab

Bioinformatics Intern

San Francisco, CA

May 2023 – Aug 2023

- Selected as 1 of 2 students (out of 15) to present research on Kinetics of Lipid Accumulation in NASH patient iPSCs, synthesizing imaging data, time-series analytics, and biological insights into a polished, conference-ready presentation
- Programmed the lab's BioSpa liquid-handling robot—unused for 5 years—to automate iPSC cell-culture workflows, reducing manual wet-lab tasks for postdocs and increasing experiment throughput, consistency, and data reliability across kinetic assays

EXTRACURRICULARS

TAMID @ Stanford

Director of Events

Stanford, CA

Oct 2024 – Present

- Lead event strategy and planning for TAMID consultants, coordinating speaker outreach, logistics, and content for high-impact sessions, including an exclusive program with Blumberg Capital's CEO & former President of the New York–Israel Chamber of Commerce, to expand engagement

Business Association of Stanford Entrepreneurial Studies (BASES)

Startup Development Director

Stanford, CA

Oct 2024 – Present

- Coordinate and moderate high-profile speaker events, managing outreach, logistics, and content planning—including a fireside chat with Y Combinator CEO Garry Tan and a cybersecurity panel on AI's impact with Bay Area founders—to strengthen the organization's startup ecosystem

Stanford Varsity Sailing Team

Division I Varsity Athlete

Stanford, CA

Oct 2024 – Present

- Walked onto Stanford's #1-ranked varsity sailing team, training 15+ hours per week and competing in five national regattas (including Boston), contributing to the team's national championship victory in Maryland during my first year

SKILLS & INTERESTS

Skills and Interests: TEDx Talk speaker; FAA-Certified Remote Drone Pilot; hiking; jazz piano; ink drawing; Languages: French and Korean.

Anahat Bawa

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EDUCATION

Tufts University

Bachelor of Science in Quantitative Economics

Medford, MA

Expected May 2028

- **GPA:** 3.83/4.00 | **Honors:** Dean's List (All Semesters)
- **Relevant Coursework:** Statistics for Quant. Econ, Microeconomic Theory, Linear Algebra, Principles of Economics, Programming Fundamentals, Health Economics, Global Health

Montgomery High School

High School Diploma

Medford, MA

May 2024

- **GPA:** 4.00/4.00 | **Honors:** Principal Honors Roll, AP Scholar with Distinction | **Sport:** Captain Varsity Fencing

WORK EXPERIENCE

Coord Health

Intern

Cambridge, MA

Sep 2025 – Present

- Conducting market outreach to over 500 prospective users for a women's healthcare HBS startup, helping refine the company's go-to market strategy and consumer targeting
- Executing multi-channel campaigns (email, social, in-person events) to boost early user engagement

Soravine Advisors

Investment Banking Summer Analyst

Skillman, NJ

Jun 2025 – Aug 2025

- Conducted industry research and buyer's list development for a potential physician's practice restructuring deal
- Built coverage databases in the restaurant and healthcare sectors to support business development
- Attended 20+ one-hour meetings with senior bankers (ex-bulge bracket) analyzing financial statements and buyer interest for a restaurant M&A deal

Make a Play Foundation

Sales & Trading Fellow

Medford, MA

Dec 2024 – Jun 2025

- Collaborated with a team of 6 to deliver an investment recommendation to Morgan Stanley's Fixed Income Team (i.e. Dan Lentz, Stephen Dance) using a 60/40 split between equity & fixed income for a client's \$1M retirement portfolio, analyzing market fundamentals in process

Sahara Mediterranean Restaurant

Server

Princeton, NJ

May 2023 – Nov 2023

- Managed 40+ orders per five-hour late-night shift, including dine-in and take-out calls, ensuring accurate and timely order completion for customers and delivery drivers

LEADERSHIP & PROFESSIONAL DEVELOPMENT EXPERIENCE

Tufts Investment Banking Club (TIBC)

Analyst

Medford, MA

Jan 2025 – Present

- Selected into highly competitive application-based investment banking mentorship and training program
- Participate in semiweekly educational sessions to prepare for the investment banking recruitment process and receive rigorous training in accounting, valuation, M&A, and LBO concepts

Tufts Varsity Women's Fencing

Student-Athlete, Sabre Fencer

Medford, MA

Aug 2024 – Present

- Dedicate 20 hours weekly to weight training, practices, competing in meets, and travel
- Recognized by the US Fencing Coaches Association as an All-American for 2024-2025 season
- Collaborate in a team to strengthen morale and improve individual performance to contribute to NCAA team rankings

Tufts Community Union Senate

University Senator

Medford, MA

Apr 2025 – Present

- Elected Community Senator, representing 6,000+ undergraduates; partner with student organizations, administration, and faculty to implement initiatives that improve student services, campus safety, and alumni network

SKILLS & INTERESTS

Skills: Google Suite, Microsoft Excel, Microsoft PowerPoint, Microsoft Word, Pitchbook, Python, Wix

Interests: Tennis, Podcasting, *The Office*, Food Blogging, Birria Tacos, Stand-up Comedy, Green Bananas, Running

Certifications & Training: Wall Street Prep (Three Financial Statements, DCF, LBO Certificates)

Andrew Zhou

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EDUCATION

University of Pennsylvania, College of Arts & Sciences | Philadelphia, PA

September 2024 – present

Candidate for B.A. in Economics & International Relations

Expected May 2028

Minor: Statistics & Data Science | GPA: 3.5/4.0

Relevant Coursework: Entrepreneurship Through Acquisition, Game Theory, Business Statistics, Statistical Computing with R, Introduction to Microeconomics & Macroeconomics, Multivariable Calculus

Germantown Academy | Fort Washington, PA

September 2020 – June 2024

SAT scores: Math (770) / Reading & Writing (770) | GPA: 4.7/4.0

Early Cum Laude | Men's Swimming Team & Club Captain | Finance Club Senior Leader | Upper School House Prefect

PROFESSIONAL EXPERIENCE

LL Funds, LLC | Philadelphia, PA

May – June 2024

Senior Project Intern

- Engaged with all of LL's investments (private equity, fixed income, lending) through internal, board, and pitch meetings
- Summarized commonalities of all private equity investments in an executive memo and presented findings to Senior Project advisors. Later invited to present to the whole school

Germantown Academy Summer Camps | Fort Washington, PA

June 2021 – Aug 2023

Lifeguard

- Oversaw the wellbeing of 80+ campers daily, ensuring a safe and enjoyable environment
- Utilized certifications in water safety, emergency response, and CPR/AED to respond to on-site incidents
- Collaborated with staff to plan and execute recreational activities for campers

Habitat for Humanity | Fort Washington, PA

June 2021 – Nov 2023

Warehouse Associate

- Optimized the loading dock layout, increasing accessibility and reducing processing time for incoming donations
- Skilled in handling and organizing construction materials and tools, managing inventory efficiently

ACADEMIC COURSES & PROJECTS

Entrepreneurship Through Acquisition

Fall 2024

- Studied the acquisition of existing operating business through cases studies and projects
- Delivered a 30-page acquisition analysis of DuCore Expertise, an independent Canadian-based medical group
- Conducted due diligence, built purchase models, and planned capital structure for DuCore's acquisition

Wharton Private Equity & Venture Capital Academy

Fall 2024

- Studied private equity fundamentals through technical analysis including merger models and LBOs
- Presented deliverables proposing the buyout of 3 prospective companies (Helen of Troy, Deckers Outdoor Corp., Toast)

EXTRACURRICULAR ACTIVITIES

University of Pennsylvania Men's Varsity Swimming

September 2020 – present

Division I Student-Athlete

- Trains 20+ hours weekly while maintaining a rigorous academic schedule, increasing time-management skills
- Developed leadership and organizational skills through Penn Athletics Wharton Leadership Academy

Wharton Asia Investments Special Situations Group

September 2024 – present

Investment Analyst

- Applied valuation methodologies and accounting principles, analyzed special situations such as distressed debt
- Drafted an investment pitch recommending a long position on Tegna for case competitions

Other Extracurricular Activities: Wharton Investment & Trading Group; Wharton Hedge Fund Club; Penn Beekeeping Club

SKILLS & INTERESTS

- **Technical:** Microsoft Office (Excel, PowerPoint, Word) | Communication | Basic financial modeling | R
- **Languages:** Mandarin (native) | French (limited working proficiency)
- **Interests:** Backpacking | European History | Poker | Cognitive Neuroscience books

Anikwe O. Duru

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EDUCATION

The Wharton School, University of Pennsylvania

Candidate for B.S. in Economics (Concentration in Finance)

Philadelphia, PA

August 2024 – May 2028

- **Cumulative GPA:** 4.0/4.0 | **SAT:** 1520 (Reading and Writing – 780, Math – 740)
- **Varsity Athlete:** Track & Field (Decathlon, Heptathlon, Sprints)
- **Honors/Awards:** Blackstone Future Leaders, KKR Scholars, Goldman Sachs Emerging Leaders Series, 1st Place: BlackGen Capital National Winter Summit, 3rd Place: BlackGen Capital National Spring Conference, Guggenheim FDOJ, Adventis Financial Modeling Scholarship, #5 All-Time at UPenn in the 60m Dash (6.83), #9 All-Time at UPenn in the 4x100m Relay (40.52)

PROFESSIONAL EXPERIENCE

Morgan Stanley

Incoming Investment Management Summer Analyst (Private Equity Secondaries)

New York, NY

June 2026 – August 2026

Harbor Street Capital

Private Equity Analyst

Miami, FL

January 2025 – August 2025

- Evaluated 1,000+ potential acquisition targets by analyzing industry dynamics, business models, and customer characteristics
- Mentored junior analysts by teaching firm investment criteria, diligence frameworks, and deal screening methodologies

Selected Transaction Experience:

- *\$24mm acquisition of a charter school management company (Expected Close Q1 2026)*
 - Researched Education Management Organization (EMO) industry dynamics, risks, and drivers alongside growth opportunities
 - Assisted in building investor materials, including an extended teaser highlighting school performance, student population growth, and student performance growth YoY for academies under the EMO's management relative to regional comps

Macquarie Bank

Commodities & Equities Trading Spring Extern

Philadelphia, PA

March 2025

- Worked with a Macquarie commodities trader to evaluate USDA reports and macro news as related to commodities' balance sheets
- Coded a backtester analyzing the efficacy of a crude oil trading strategy based on the 50-day vs. 200-day SMAs for the past 10 years
- Analyzed correlations between commodities and commodity-based equities' stock, EBITDA, and EBITDA projections

EXTRACURRICULAR EXPERIENCE

University of Pennsylvania Track & Field

Varsity Athlete

Philadelphia, PA

August 2024 – Present

- Train for and compete in the multi-events (decathlon, heptathlon) and sprints (60m, 100m, 200m) for the varsity Track & Field team
- Work with fellow selected representatives from each athletic team as a member of the Student-Athlete Advisory Committee (SAAC)
- Learn to translate student-athlete skills into advantages in the professional world in the Penn Athletics Wharton Leadership Academy
- Deliver presentations to the Board of Alumni, detailing initiatives to support the professional development of athletes on the team

BlackGen Capital

Analyst, Sector Lead

Philadelphia, PA

August 2024 – Present

- Conduct fundamental research, including financial analysis, valuation, and industry drivers, to build investment theses across sectors
- Served as sector lead for the Consumer group, working with analysts on the team to analyze industry trends and market dynamics

Selected Pitch Experience:

- *Spinoff pitch on Roto-Rooter, a subsidiary of \$6.3bn holding company Chemed Corporation (NYSE: CHE)*
 - Developed spinoff theses based on Roto-Rooter's performance and brand premium, and Chemed's large post-spin opportunities
 - Built discounted cash flow and comparable company analyses, estimating a sale price between \$4-\$4.5bn for Roto-Rooter

NextGen Chess

Founder, CEO

Washington, D.C.

May 2023 – Present

- Designed and facilitated after-school and summer chess programs for youth in under-resourced communities in Washington, D.C.
- Partnered with two new schools serving under-resourced youth in Washington D.C. and donated 14 chess sets in 2024
- Organized a 37-player, city-wide tournament, utilizing proceeds to purchase 20 chess sets for D.C. schools in 2023

ADDITIONAL INFORMATION

Technical Skills: Microsoft Office (Excel, PowerPoint, Word) | Financial Modeling | Capital IQ | Public Speaking

Interests: American Football (Baltimore Ravens, Fantasy Football) | Chess | Card Tricks | Music Production | Limited Sneakers

Other Affiliations: Make a Play Foundation | SEO Career | Bridging the Gap (BTG) | Black Wharton Undergraduate Association

Caleb Ihegihu

Cci2111@columbia.edu | (301) 538 3115 | www.linkedin.com/in/calebihegihu

EDUCATION

Columbia University | New York, NY

May 2028

Bachelor of Data Science with a Secondary in Business Economics

Major GPA: 3.9

- **Conferences / Programs:** Black Gen Capital Conference (Warburg Pincus); Training the Street; Goldman Sachs Virtual Insight Series; Point 72 Academy Spring Session
- **Relevant coursework:** Accounting Principles, Calculus III, Macroeconomics, Managerial Accounting, Microeconomics, Statistics-Business & Economics

PROFESSIONAL EXPERIENCE

Columbia University Varsity Football – NCAA Division 1

New York, NY

Student Athlete – Linebacker

August 2024 – Present

- Dedicated 30+ hours per week to training, competition, and travel while maintaining full academic course load.

Certified Lifeguard Columbia University

New York, NY

Lifeguard

August 2025 – Present

- Monitored swimming areas to ensure guest safety, enforced rules, and responded quickly to emergencies, administering CPR and first aid as needed
- Hold active certifications in Lifeguarding, CPR/AED for the Professional Rescuer, First Aid, and Emergency Oxygen Administration.

Math ETC

Bowie, MD

Coordinator/Tutor

February 2025 - Present

- As Camp Coordinator of Math ETC summer camp, I drove 80k + in revenue and 50% enrollment growth by enhancing camp experience and executing targeted marketing strategies for 95+ children.
- As a Tutor, delivered individualized math instruction to students aged 5-16, tailoring lessons to diverse learning need.

Daimler Inc

Chevy Chase, MD

Assistant Project Manager

May 2024 – August 2024

- Managed daily operations for over 10 teardown properties in Washington DC, with values ranging from \$500k to \$30 million

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Lion Fund (Columbia University)

November 2024 - Present

Analyst

- Participate in stock pitches weekly for Columbia university's oldest ran student-run investment fund (+\$75'000 AUM), utilizing Excel and advanced financial analysis to assess investment opportunities

Black Gen Capital (Columbia University)

November 2024 – Present

VP of Education

- Design and teach weekly sessions on financial principles, including accounting, Valuation methods and financial statement analysis.

Football in Finance (Columbia University)

January 2025 – April 2025

Analyst

- Lead weekly finance discussions with collegiate football teammates, analyzing recent M&A activity, market -moving deals, and Macroeconomic financial trends.

Alex Brown & Raymond James

March 2024 – August 2024

Fellow

- Shadowed Todd Kingsley, Managing Partner at Alex Brown & Raymond James, gaining exposure to \$4B+ portfolio management and strategic investment decision making.

SKILLS & INTERESTS

Interests: Sports, Piano, Swimming, Tennis, Mineralogy, Fashion.

Skills: Bloomberg Terminal, Financial Modeling, Microsoft Office (Excel, PowerPoint, Word)

Languages: English (Native), Yoruba (Proficient)

CAMERON (CAMI) COLPITTS

(415) 418-4174 | c.colpitts@wustl.edu | linkedin.com/in/cameron-colpitts

EDUCATION

Washington University in St. Louis, Olin Business School | St. Louis, MO **May 2028**
Bachelor of Science in Business Administration

Major in Finance, Minors in Business Analytics & The Business of Sports

- GPA: 3.89/4.00; Dean's List (All Eligible Semesters)

Marin Academy High School | San Rafael, CA **June 2024**
High School Diploma

- Activities: 1st Team All-League and Captain of Women's Varsity Golf, 1st Team All-League and Captain of Women's Varsity Soccer, Marin Academy Student Investment Fund
- Awards: 2024 Female Athlete of the Year, DII Northern California Soccer State Championship

PROFESSIONAL EXPERIENCE

Bay Football Club (Professional Women's Soccer Team) | San Francisco, CA **June 2025 – July 2025**
Growth & Retention and Accounting Intern

- Conducted competitive analysis by evaluating marketing strategies of industry peers, drafted detailed campaign briefs for paid social media advertising, and presented to senior executives on long-term marketing initiatives
- Supported the accounting department by organizing and reconciling invoices to ensure accuracy and audit readiness
- Developed proficiency in Excel, Airbase, and NetSuite while balancing competing deadlines across marketing and accounting projects

Belvedere Tennis Club | Tiburon, CA **May 2024 – July 2024**
Lead Camp Counselor

- Supervised a team of 10 counselors while managing activities for up to 50 campers
- Coordinated daily itineraries, enforcing safety protocols, and fostering an inclusive, engaging environment that enhanced camper experience and staff effectiveness

Compass Family Services | San Francisco, CA **May 2023 – July 2023**
Intern Under Volunteer & Community Resources Coordinator

- Partnered with a non-profit organization of 200+ staff across 13 programs dedicated to supporting homeless and at-risk families
- Contributed to the planning and execution of programs and events, strengthening community engagement and expanding resource accessibility

LEADERSHIP & COMMUNITY DEVELOPMENT

WashU Varsity Women's Soccer | St. Louis, MO **August 2024 – Present**
Left Midfielder

- Won the 2024 NCAA Division III Women's Soccer National Championship with an undefeated season
- Totaled 5 goals and 4 assists as a top 5 leading scorer as a rookie, played in all 25 games, totaling 976 minutes
- Balanced 25+ hours per week of training and competition with a full academic course load

WashU Student Investment Fund | St. Louis, MO **January 2024 – Present**
Senior Analyst

- Researched and analyzed companies within the Technology, Media, and Telecommunications (TMT) sector, evaluating financial performance, industry trends, and competitive positioning to identify attractive investment opportunities
- Co-developed and presented a full investment pitch on Toast, Inc. (NYSE: TOST), assisting the portfolio manager in building a detailed discounted cash flow model
- At the time of purchase (3/6) shares traded at approximately \$34.1, and following a Buy rating from 80+ fund members, the position was later exited at around \$40 per share, generating an approximate 17% gain

Student Athlete Advisory Committee (SAAC) | St. Louis, MO **August 2025 – Present**
Community Engagement Committee Member

- Supported community service initiatives and represented Women's Soccer in fostering athlete engagement with campus and St. Louis communities

U17 Canadian National Team | Vancouver, BC **March 2021 – September 2022**
Midfielder

- Selected to the U17 Women's Canadian National Soccer Team in 2021, representing Canada on the international stage
- Traveled to the Concacaf Cup (World Cup Qualifying) in the Dominican Republic in 2022, where the team placed third and secured a ticket to the U17 World Cup in India
- Trained and competed for 4 weeks abroad while balancing international competition with academic commitments

SKILLS & INTERESTS

- *Technical:* Microsoft Office, Tableau, Java (elementary)
- *Interests:* Soccer, Golf, Skiing, Travel, Backpacking

Carly Hamilton

774 Mays Blvd 10-252, Incline Village, NV 89451
(775) 530-4096 | hamiltbt@bc.edu

EDUCATION

Boston College – Carroll School of Management

B.S. in Management, Concentration in Finance

Chestnut Hill, MA

Expected May 2028

- **GPA:** 3.76 / 4.00
- **Honors:** Dean's List First Honors (All Semesters)
- **Relevant Coursework:** Fundamentals of Finance, Financial Accounting, Statistics, Coding for Business

WORK & LEADERSHIP EXPERIENCE

Boston College Women's Varsity Ski Team

Team Member

Chestnut Hill, MA

Aug 2024 – Present

- Recruited for D1 team ranked top 15 nationally, competing at the highest NCAA level in 50+ races per year
- Train 30+ hours per week on the mountain and in the gym in-season while balancing competition, weekly travel and a full academic course load requiring strong time management and organizational skills
- Ranked top 10 nationally for birth year in the slalom discipline, competing in FIS and USSA events

Boston College Women in Business

Treasurer

Chestnut Hill, MA

Sep 2024 – Present

- Collaborate with 20 board members to evaluate funding requests and develop semester budgets
- Manage \$9,000+ in annual gift, donation, and university funding accounts, reconciling expenditures and maintaining compliance with university policies, financially supporting 100+ events for 500+ members
- Designed 60+ graphics to advertise networking events promoted in the newsletter driving attendance

Juvenon

Digital Marketing Assistant and Finance Intern

Remote

Apr 2024 – Aug 2025

- Produced 100+ digital ad campaigns on Meta/TikTok targeting customers 40+, helping drive \$30M in sales
- Integrated AI software to rapidly iterate and test ads, reducing costs by \$30K and saving 60+ hours weekly
- Launched and analyzed customer surveys, captured 5,000+ customers' feedback, influencing future products
- Developed a Cash Conversion Cycle dashboard to optimize liquidity and working capital during rapid growth

Tahoe Toddlers

Founder/Entrepreneur

Lake Tahoe, NV

Dec 2019 – Aug 2025

- Founded and scaled a childcare business by identifying a market gap, executing targeted outreach, and establishing a recurring client base of 30+ families to deliver high-quality, individualized care
- Generated \$15,000+ in revenue over 5 years through strategic marketing to local parents and personalization of client experience to maximize client retention within the community, fostering long-term customer loyalty

Apex 2100

Team Member

Tignes, France

Apr 2023 – May 2024

- Selected among 8 top female U.S. and international teammates for postgraduate professional ski team
- Dedicated 40+ hours weekly to training and competing in 50+ leading European races, placing top 15 in 5+ Italian and French national junior championship races against elite international fields

ACTIVITIES & INTERESTS

Activities: Goldman Sachs Possibilities Summit, Women Innovators Network, Make a Play Foundation Captain

Interests: Rock Climbing, Depop, Mountain Biking, *Criminal Minds*, Eckhart Tolle, Gluten-Free Baking

Catherine G. Ruf

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EDUCATION

Columbia University – New York, NY

Bachelor of Science, Financial Economics

Expected Graduation: May 2028

Cumulative GPA: 3.50/4.0

Accomplishments: D1 Varsity Rowing; Delta Gamma Sorority, Make-A-Play Foundation (2025 *Diamond League Investment Fellow*)

Relevant Coursework: Wall Street Prep: Accounting & Financial Statement Analysis Certification

PROFESSIONAL EXPERIENCE

RBC Capital Markets

Early ID Participant | Global Investment Banking Track

New York, NY

Dec 2025 – Present

- Selected to participate in a competitive Early ID program providing structured exposure to Global Investment Banking, developing foundational understanding of valuation, capital markets, and M&A through formal training and applied exercises
- Engage in dedicated mentorship with both a Senior and Junior Banker, strengthening technical proficiency, professional judgment, and communication skills through guided feedback and real-world banking perspectives
- Participate in an on-site immersion day reviewing RBC transactions, industry analyses, and company research across multiple sectors, gaining insight into end-to-end deal execution and firm-wide advisory capabilities

Guggenheim Securities

MAP Investment Banking Fellow

Remote

Sep 2025 – Dec 2025

Selected Transaction Experience

Little Spoon — ~\$300–350M *Implied Enterprise Value (Consumer & Retail Acquisition Simulation)*

- Owned the Planning Phase by constructing a banker-style Financial Summary for **Little Spoon**, synthesizing revenue, margin, liquidity, and balance-sheet health to frame baseline financial strength for presentation to Guggenheim C&R analysts Kathryn Ellis & Rhett Young
- Built forward-looking operating views by analyzing revenue growth from \$130M (2024) to ~\$237M (2028) and gross margins in the low-to-mid-40% range, establishing credible financial momentum to support analyst-level valuation underwriting and live presentation review
- Assessed balance-sheet strength and cash-flow durability by modeling a light-asset structure, internally funded growth, and positive free cash flow by 2025, reducing financing risk highlighted in discussions with Guggenheim C&R analysts during the Q&A portion of team's final presentation
- Translated detailed income statement, balance sheet, and cash-flow projections into a clean, decision-ready financial snapshot, enabling seamless handoff across 4 deal phases (planning, execution, control, monitoring) & live review with C&R analyst Rhett Young without assumption re-work

SFW Capital Partners

Private Equity Summer Analyst

Rye, NY

Jun 2025 – Aug 2025

- Researched and developed industry sector theses by analyzing market structure, growth drivers, and competitive dynamics, supporting sourcing efforts and investment screening during a 10-week private equity internship
- Built detailed profiles of potential target companies by evaluating business models, financial performance, and strategic positioning, creating decision-ready materials to inform senior-level investment discussions
- Prepared and presented in-depth sector presentations with selected target profiles to senior management, demonstrating investment judgment, structured communication, and the ability to synthesize analysis into actionable insights

Keybank Capital Markets

Investment Banking Extern

Remote

Jun 2023 – Aug 2023

- Shadowed investment banking analysts during preparation of sell-side materials for a privately held custom manufacturer, gaining exposure to transaction workflows, diligence processes, and client-ready deliverables
- Reviewed draft marketing and analytical materials alongside deal team members, developing foundational understanding of sell-side execution, attention to detail, and professional standards in a live transaction setting

EXTRACURRICULARS

Columbia University Women's Rowing Team

Varsity Athlete

New York, NY

Aug 2024 – Present

- Commit 40+ hours per week to Division I training, competition, and travel while balancing a rigorous academic course load
- Contribute to team success through consistent training & race execution, demonstrating inclusive, transparent leadership that supports development

First Selectman's Youth Commission

Member

Greenwich, CT

Fall 2021 – April 2024

- Selected to represent Sacred Heart on the First Selectman's Youth Commission, addressing youth priorities and community initiatives in Greenwich
- Led development of the inaugural FSYC website, coordinating content and structure to improve community engagement and accessibility
- Contributed as a sub-committee member to Girls with Impact and the Student Diversity Leadership Conference, supporting finance and inclusion-focused programming

The Barat Foundation

President

Greenwich, CT

Fall 2021 – April 2024

- Selected by faculty, administration, and peers to serve as President of the Upper School's philanthropic organization
- Led school-wide philanthropic initiatives, demonstrating leadership, accountability, and the ability to mobilize peers around shared community goals

SKILLS & INTERESTS

Skills: Microsoft Office (Word, PowerPoint, Excel), Python, Scratch, Squarespace Website Design, Photoshop, Photography, GoogleDocs, Spanish - Proficient

Chloe Brissett

linkedin.com/in/chloe-brissett | (346) 770-4968 | brissett@wustl.edu | Houston, TX

EDUCATION

Washington University in St. Louis, Olin Business School

St. Louis, MO

BSBA; Dual Majors in Finance & Accounting

May 2028

- **GPA:** 3.75/4.0; **Dean's List:** All Eligible Semesters
- **Relevant Coursework:** Financial Accounting, Managerial Statistics, Individual in a Managerial Environment
- **Activities:** Student Athlete on WashU Varsity Women's Tennis Team — 2025 NCAA National Champion

The Kinkaid School

Houston, TX

High School Diploma

May 2024

PROFESSIONAL EXPERIENCE

ibRecruit

Selected Participant

May 2025 – Present

- Selected for a competitive training and mentorship program for college women pursuing investment banking

Next Idea Investments

St. Louis, MO

Investment Analyst

December 2024 – Present

- Conducted deal sourcing by identifying and evaluating potential acquisition aligned with the fund's investment thesis
- Analyzed and reviewed seven companies' CIMs to assess financial performance, industry dynamics, and key value drivers
- Performed preliminary financial and qualitative analysis through building DCF models on target companies to determine strategic fit and investment potential

Garcia Hamilton & Associates

Houston, TX

Finance Intern

June 2024 - August 2024

- Built and presented five macroeconomic reports to the investment team on inflation, labor data, and recessionary signals, resulting in two tactical shifts in portfolio duration and credit
- Analyzed market trends in interest rates and credit spreads to inform investment decisions and identify valuable opportunities

Icon Wealth Partners

Houston, TX

Wealth Management Intern

January 2024 - February 2024

- Tracked interest rate changes and Fed policy updates, synthesizing weekly insights that supported fixed income and equity allocation decisions across \$500M in AUM
- Engaged in six client and strategy meetings, gaining exposure to portfolio strategy for private wealth clients

Forge Equity Partners

Houston, TX

Summer Intern

July 2023

- Assisted in analyzing private company investments, evaluating EBITDA margins, and contributing to the structure of investment opportunities under various risk and return profiles

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Goldman Sachs Virtual Insight Series

New York, NY

Selected Participant

May 2025

- Completed multi-week program exploring firm divisions, including investment banking and asset management; gained exposure to industry professionals and recruiting preparation strategies

Guggenheim Freshman Day on the Job

New York, NY

Selected Participant

April 2025

- Selected to participate in a competitive early insight program; engaged with senior bankers to explore M&A Advisory, firm culture and the investment banking recruiting process

Morgan Stanley Jumpstart Scholar

New York, NY

Selected Participant

November 2023 – June 2024

- Collaborated with Morgan Stanley analysts and associates to develop comprehensive company profiles for Airbnb

ADDITIONAL INFORMATION

- **Technical Skills:** Microsoft Office Suite
- **Languages:** Conversational Proficiency of Spanish
- **Interests:** Board Games, True Crime Podcasts, Contemporary Art, Hiking, Hot Yoga

FREDERIC (COLE) C. DENSON

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EDUCATION

Duke University – Durham, North Carolina

Anticipated Graduation: 2028

B.S. in Economics | Minor in Computer Science

- **GPA:** 3.97/4.00
- **D-Squad Player of the Year:** Awarded to the best Duke Football player in practice throughout the season, demonstrating consistent determination, drive, and excellence.
- **Relevant Courses:** Economic Principles; Multivariable Calculus for Economics; Intermediate Microeconomics I; Practical Financial Markets; Selected Topics in Economics: Games of Strategy; Data Structures & Algorithms

Rye Country Day School - Rye, New York

- **Con Edison Scholastic Sports Award Tony Sabella Memorial Scholarship Winner:** Awarded to student-athletes demonstrating exceptional academic performance, leadership, and athletic dedication. Three recipients in the Lower Hudson region.
- **Westchester Golden Dozen Student-Athlete:** Recognized as one of the top 12 high school football players in Westchester County for outstanding academic and athletic achievements.
- **AP Scholar with Distinction:** Earned top scores on BC Calculus, Statistics, and SAT Math exams, demonstrating strong proficiency in complex mathematical concepts.
- **Rye Country Day Parents Association Prize:** Awarded in recognition of the individual who demonstrated exemplary personal growth, service, and leadership to others throughout their time at the school.

PROFESSIONAL EXPERIENCE

TPW Advisory

July 2025 – Present

Portfolio Analyst Intern

Remote

- Analyzed macro trends across four major asset classes; prepared 300+ charts to support portfolio positioning in global macro and thematic ETFs providing insights for weekly CIO market discussions with ~30 incorporated into monthly client-facing research.
- Performed monthly benchmark analyses on 30+ portfolio holdings using technical analysis and sell-side research, recommending position adjustments to improve diversification and returns.
- Refined Python script to automate retrieval of asset prices and key metrics, streamlining performance tracking and market analysis.

Make-A-Play Foundation

June – July 2025

MAP NXT Fellow

Remote

- Selected from a competitive pool of student-athletes for an eight-week finance fellowship focused on IB and PE preparation.
- Collaborated on a team case study applying valuation and financial modeling concepts to real-world scenarios.
- Completed weekly mock interviews with Vista Equity Partners professionals, developing technical expertise and interview readiness.

NEFN (Northeast Financial Network)

May – June 2025

Wealth Management Intern

Holmdel, NJ

- Observed client interactions and analyzed financial case studies with MD, enhancing understanding of diverse client profiles.
- Built foundational knowledge of wealth management practices (retirement solutions, risk management, client service) and career development within a boutique financial firm.
- Assisted advisors with client meeting preparation and case discussions, gaining exposure to how personalized investment strategies are built around each client's goals and cash-flow needs.

LEADERSHIP & COMMUNITY DEVELOPMENT

Duke Football Team – Team Member | Durham, NC

June 2024 – Present

- Committed 50+ hours each week to lifting, meetings, practices, film study, and games year-round, all while competing to perform at the highest level in college sports.
- Academic All-ACC Wide Receiver training under one of the top 5 strength programs in the nation.

Rye Country Day School – Captain of Football, Basketball, and Track Teams | Rye, NY

September 2019 – June 2024

- Led teams to multiple championships by encouraging teamwork, intensity, and belief.

Rye Country Day School – Peer Leader | Rye, NY

September 2023 – June 2024

- Mentored underclassmen, helping them navigate academic and personal challenges by leading bi-weekly presentations on life skills.
- Improved leadership and communication skills by creating events and developing curriculum with students and faculty.

SKILLS & INTERESTS

- **Skills and Language(s):** Python and Java, French (Conversational), Quantitative Problem-Solving, Portfolio Analysis, Leadership
- **Interests:** Cooking, Puzzles: Killer Sudokus, Crosswords, and Chess, Type Racing (125 WPM), Math Competitions, Saxophone

Colleen R. Maloney

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EDUCATION

Georgetown University – Washington, DC

Bachelor of Arts, Finance and Management

Expected Graduation: May 2028

Cumulative GPA: 3.96/4.0

Accomplishments: St. John's College High School Salutatorian & Math Excellence Awardee, NFHCA National Academic Squad & Scholar of Distinction

Relevant Coursework: Operation Analytics 1101 & 2101, Financial Accounting 1101, Managerial Accounting 2101, Business Financial Management 2101

Independent Coursework: Microeconomics (London School of Economics); Accounting & Financial Statement Analysis Certification (Wall Street Prep)

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow; Team Co-Captain

Remote

Nov 2025 – Present

Selected Transaction Experience

- Medallion — *Healthcare Technology / Provider Enablement Strategic Advisory Simulation*
 - Led the Initiation Phase as Co-Captain, framing a healthcare investment thesis by sizing an ~\$11.0T global / ~\$4.5T U.S. TAM, defining a \$500B–\$2T SAM, and anchoring relevance with a ~\$9–12B SOM to establish scale, investability + strategic urgency for downstream diligence
 - Built the Industry Snapshot by prioritizing three growth subsectors—pharma/biotech (biologics ~29% of global drug sales, biomarker-driven diagnostics), medical devices (~5% CAGR to ~\$800B by 2030), and healthcare services to contextualize durable demand + M&A momentum
 - Developed a client-ready Company Snapshot positioning **Medallion** as an API-first, AI-enabled credentialing platform (50–200 employees) automating provider onboarding and compliance, benchmarking against symplr (incumbent enterprise scale) and Abridge (adjacent clinical AI)
 - Identified ~5 deal-critical risks and mitigants, including verification error exposure and credentialing workforce shortages, proposing automation-driven controls (primary-source checks, audit trails, centralized workflows); documented growth assumptions on margin expansion

Rem and Company

Team Lead

Washington, DC

Jan 2025 – Present

- Lead consulting engagements for 3+ local DC businesses, conducting deep-dive analysis of marketing performance, unit economics, and customer acquisition channels to design revenue growth strategies aligned to each client's operating model and competitive positioning
- Implement strategic recommendations across 5+ functional initiatives including pricing optimization, digital marketing execution, and customer targeting, driving measurable revenue growth, improved conversion efficiency, and stronger operational performance for client businesses

Georgetown Collegiate Investors

Morningstar Equity Research Travel Analyst

Washington, DC

Sep 2024 – Present

- Analyzed 10+ consumer & retail equities, evaluating business models, competitive positioning & financial performance to identify new opportunities
- Completed Fall Trainee Program through weekly proprietary GCI training sessions, building expertise across valuation, markets & financial analysis
- Built valuation models and delivered 3+ investment pitches supported by DCF and comparable analysis, contributing to final buy hold sell decision/s

Vista Equity Partners

MAP Alternative Investments Fellow

Remote

Jun 2025 – Aug 2025

Selected Transaction Experience

- StatStream Technologies — *Technology M&A / Strategic Advisory Simulation*
 - Led the Planning Phase as primary owner of 10+ foundational deal tasks, completing 15+ hours of Wall Street Prep accounting coursework and a 10-question Income Statement assessment to build technical fluency, ultimately supporting all downstream valuation and diligence work
 - Performed Comparable Company Analysis by sourcing public financial data for 2–4 SaaS analytics peers, analyzing revenue scale, growth rates, & margin profiles to establish a defensible valuation framework aligned with tech M&A standards/current precedent transaction benchmarks
 - Developed a client-ready Company Overview for **StatStream Technologies**, analyzing 5+ core factors including business model, recurring revenue mix, market positioning, and competitive differentiation to inform 100% of subsequent financial modeling and value-creation analysis
 - Synthesized market and company research into an investment thesis supporting acquisition of a ~\$580M revenue, 33% EBITDA margin target, evaluating \$45B TAM growth, 9% CAGR market dynamics & \$5M+ cost-savings upside to strengthen team's overall strategic judgment

Morgan Stanley

MAP Sales & Trading Fellow, Scrum Master

Remote

Mar 2025 – May 2025

- Served as Scrum Master for a 4-person deal team executing a \$2.5M retirement portfolio advisory simulation, coordinating 6 workstreams including PESTEL analysis, investment thesis, risk assessment, and financial projections to ensure on-time, cohesive client-ready delivery
- Directed team execution toward a 60% equities / 40% fixed income mandate, integrating inputs across 7 asset classes and 3 scenario cases to support disciplined portfolio construction, clear communication, and analyst-level presentation to Morgan Stanley evaluators

LEADERSHIP & EXTRACURRICULARS

Georgetown Field Hockey

NCAA Division 1 Varsity Athlete

Washington, DC

Aug 2024 – Present

- Led the team in scoring as a freshman, while managing daily roll call and 15-minute early arrivals to reinforce discipline, preparation & accountability
- Strengthened team culture by organizing the program's first overnight trip and implementing a buddy system pairing upperclassmen with underclassmen, contributing to a 300% improvement in team record year over year

St. John's High School

CFO & President of Entrepreneurial Club, Tutor

Washington, DC

Sep 2020 – May 2024

- Led academic and athletic mentoring initiatives by tutoring 10+ underprivileged San Miguel middle school students through monthly math-focused sessions and coaching 10-year-old field hockey athletes, customizing instruction to improve academic performance, technical skills, and confidence
- Served as CFO and President of the Entrepreneurial Club over 4 years, organizing weekly meetings, mock Shark Tanks, and guest speaker events, driving 30+ new member additions and sustained engagement through hands-on business simulations

SKILLS & INTERESTS

Skills: Advanced Excel, AirTable, Alteryx, Tableau, PowerBI, Microsoft Office Suite, Public Speaking

Interests: GF and DF baking, letters, dogs, outdoor activities

COSMO FUSCO

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EDUCATION

University of Pennsylvania – Philadelphia, Pennsylvania

GPA: 3.85 /4.0

B.A. in Economics and Mathematics | Minor in Statistics

Anticipated Graduation: May 2028

- Relevant Courses: Microeconomics, Macroeconomics, Multivariable Calculus, Statistics, Intermediate Spanish

PROFESSIONAL EXPERIENCE

Make a Play Foundation X Guggenheim Securities – *Undergraduate Fellow* | New York, New York (Remote) **September 2025 – Present**

- Selected as one of 30 Fellows (from 200+ athletes, top ~15%) in MAP's Diamond League playoff-style competition, partnering with Guggenheim Securities on a live consumer and retail case.
- Collaborating on a 5-member analyst team, simulating a Guggenheim deal team advising a private equity client by creating 10+ company profiles and financial summaries utilizing president transaction and trading multiples valuation techniques

Fortitude Capital – *Venture Capital Summer Analyst* | New York, New York (Hybrid) **June 2025 – August 2025**

- Built and stress-tested 3 statement financial model incorporating sensitivity analysis on key market assumptions including a comprehensive pricing analysis of 148 brands to evaluate early stage retail incubation
- Performed financial due diligence and analyzed 100+ comparable companies leveraging executive interviews and primary market research to build market sizing and competitive landscape models
- Developed investor pitch deck integrating market research and financial analyses, contributing to preliminary investment commitments and staff recruitment

Penn Residential Services – *Residential and Hospitality Operations Manager* | Philadelphia, Pennsylvania **May 2025 – August 2025**

- Led team of 17 operations assistants to facilitate hospitality operations including housing 50+ Summer student programs, hosting business conferences, and maintaining campus facilities
- Utilized Microsoft Excel to organize staffing schedule and manage student occupancy data including housekeeping, damage, and arrival times across 10 campus residential buildings and 8,000 Summer program students and parents

EXTRACURRICULAR EXPERIENCE

University of Pennsylvania Football – *Student Athlete* | Philadelphia, Pennsylvania **August 2024 – Present**

- Dedicate 30+ hours per week to practice, conditioning, meetings, competitions, and travel, developing elite time management of academics and athletics
- Work together with 100+ teammates to compete against Division 1 competition and develop team work skills

Penn Undergraduate Economics Society – *Finance and Outreach Chair* | Philadelphia, Pennsylvania **September 2024 – Present**

- Led team organizing various fundraising events in collaboration with local businesses to support \$3,000+ annual club funding, charitable commitments, and campus businesses
- Communicate with Penn alumni and partner corporations including Capital One, Jane Street, and McKinsey to organize professional development and guest speaker events

Wharton Undergraduate Finance Club – *Investment Case Team Member* | Philadelphia, Pennsylvania **September 2024 – Present**

- Analyze stocks and companies using applications including Bloomberg and Pitchdeck to write and prepare stock pitches and evaluate financial situations of publicly traded companies
- Utilize Excel to practice and study 3 statement financial modeling
- Participate in team lectures and discussions about general financial, accounting, and business concepts

Penn Athletics Wharton Leadership Academy – *Freshman Mentee* | Philadelphia, Pennsylvania **September 2024 – May 2025**

- Completed leadership development program with Penn athletics and the Wharton McNulty leadership program to develop leadership, teamwork, and communication skills for athletic, academic, and professional environments
- Participated in mentorship workshops with upperclass program leaders to practice goal setting, conflict resolution, and inclusivity and expand personal and professional network within Penn athletics

NON-TECHNICAL SKILLS & INTERESTS

- Skills and Languages: Microsoft Office Suite, CFI Financial Modeling, Statistical Analysis, Teamwork, Leadership, Spanish(Intermediate)
- Interests: Recreational Sports, Sigma Chi Fraternity, The Jersey Shore, New York Giants fan, Visiting National Parks

Cristopher M. Ramirez

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EDUCATION

Harvard University – Cambridge, MA
B.A. in Economics & Philosophy

GPA: 3.89/4.0
Graduation Year: 2028

PROFESSIONAL EXPERIENCE

About U Outreach – *Counselor* | Queens, NY

06/2024 – 08/2024

- Guided 20 participants in academic achievement and leadership skills at a NYC youth development
- Oversaw sports activities and physical preparation, ensuring a well-rounded experience

Forté Preparatory Academy – *Operations Intern* | Queens, NY

06/2023 – 08/2023

- Maintained school facilities, including classrooms and offices
- Communicated with Spanish-speaking parents regarding school-related matters
- Demonstrated strong attention to detail in facility upkeep and administrative tasks

LEADERSHIP & EXTRACURRICULAR EXPERIENCE

Harvard Varsity Football – *NCCA Division 1 Student Athlete* | Cambridge, MA

08/2024 – Present

- Balance academic responsibilities, while investing over 35 hours weekly of rigorous training, and competitive games
- Develop skills in teamwork, strategy, and discipline

BLK Capital Management – *Equity Research Trainee* | Remote

10/2024 – Present

- Engage in a semester-long education program covering the fundamentals of stock pitching, including industry analysis, accounting, security selection, and financial modeling

Harvard Financial Analyst – *Member* | Cambridge, MA

09/2024 – Present

- Attend weekly educational sessions on key finance topics, such as financial analysis, corporate finance, investment strategies, and valuation techniques
- Participate in stock pitch presentations, evaluating investment opportunities, and performing in-depth analysis to provide actionable recommendations
 - Develop proficiency in financial modeling, DCF analysis, comparable company analysis, and other valuation methods to support investment decisions.

Make A Play Foundation – *Formula 1 Fellow* | Remote

01/2025 – Present

- Participate in a 9-week fellowship for student-athletes, focusing on resumes, interviews, and business communications

St. Paul's School – *Student Council President* | Concord, NH

09/2023 – 06/2024

- Acted as a liaison between faculty and students, facilitating effective communication and collaboration
 - Established a new policy to extend dorm intervisitation hours
- Served on the Discipline Committee to address and resolve student-related issues
- Spoke on panels with prospective families and alumni about School values and student life

ADDITIONAL SKILLS

- Language(s): Conversationally fluent in Spanish
- Programs: About U Outreach, Boys Club of NY
- Interests: Mindfulness & Meditation, Stoicism, Movies, Sports

Dylan Tung

Orinda, CA | 925-918-7661 | dmt96@cornell.edu | www.linkedin.com/in/dylantung

EDUCATION

Cornell University, College of Agriculture and Life Sciences

Anticipated Graduation: May 2028

Candidate for Bachelor of Science, Double Major: Information Science & Viticulture and Enology

GPA: 3.8

Relevant Coursework: Microeconomics, Macroeconomics, Statistics, Intro to Python, Social and Computer Networks

WORK EXPERIENCE

NEXT HAVEN GROUP

Chicago, IL (Remote)

Investment Analyst Intern

August 2025 – present

- Generated proprietary deal-flow and presented finds to senior partner on conducted market research to identify acquisition opportunities aligned with the firm's investment criteria (\$1-\$5M EBITDA, recurring revenue, niche B2B services)
- Deal sourced by evaluating market dynamics, competitive positioning and industry trends, growing relationships with business owners and CEOs to understand company objectives and potential investment strategies that could be utilized

E-COMMERCE AND DIGITAL COMMERCE

Orinda, California

E-commerce Specialist

June 2024– present

- Generated \$65,000+ in Gross Merchandise Value (GMV) and drove sales conversions across product categories such as clothing and appliances to viewers on a global scale through affiliate marketing campaigns on TikTok and Instagram
- Scaled audiences to 70,000+ engaged followers and sold branded social media accounts to buyers in targeted niches developing and monetizing social media accounts across niches including motivational, education and comedic content

MAKE A PLAY FOUNDATION (MAP)

Remote

Diamond League Investment Banking Fall Fellow

September 2025-present

- Worked on a team of 5 MAP analysts, partnering with Guggenheim Securities on a live Consumer & Retail case
- Competed with 200+ selected student athletes in weekly investment banking interviews placing in the top 30 Fellows

KING'S FAMILY VINEYARD

Crozet, Virginia

Harvest and Marketing Intern

July 2022– present

- Evaluated growing practices and water use alongside winemakers to cultivate grapes used for small-scale production, supporting sustainable viticulture practices, reducing recourse waste, and rigorous quality control in harvest cycles
- Grew social media following to 30,000+ by executing marketing strategies and analyzing audience engagement data, translating insights into targeted content campaigns that enhanced brand visibility and strengthened customer relationships

ACTIVITIES & LEADERSHIP

CORNELL MEN'S POLO TEAM

Ithaca, NY

NCAA Student Athlete

August 2024-present

- Competed at a national level, demonstrating teamwork and discipline in a high-performance, competitive environment
- Ensured horses remained healthy, fit, and competition-ready while managing demanding academic commitments

CORNELL UNIVERSITY

Ithaca, NY

Resident Leader

August 2025-present

- Led a hall of 450+ undergraduate residents, coordinating directly with university administration and other resident leaders to uphold community standards and implement engagement initiatives that fostered inclusion and resident participation
- Responded to incidents involving medical emergencies, mental health crises, and student conduct violations, making rapid and informed decisions while communicating with Cornell emergency services to ensure prompt and reliable resident safety

ROSELAND POLO CLUB

Crozet, Virginia

Polo Coach and Semi-pro

July 2022– present

- Designed and implemented personalized training programs that improved players' riding and competitive performance
- Played as a semi-pro in practices and tournaments, maintaining game quality and contributing to competitive results

SKILLS & INTERESTS

Skills: Native Working Mandarin, Excel, PowerPoint, Word, R Programming, Python, Canva

Interests: Golf (3), Piano, Fitness, Wine, Sustainability, Marketing, Video Creation and Editing, Card Tricks, Fishing

Dylan J. Whisenant

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EDUCATION

Tufts University – Medford, MA

Bachelor of Arts, Economics | Minor in Finance | SAT: 1540

Expected Graduation: May 2028

Cumulative GPA: 3.77/4.0

Accomplishments: School of Arts and Sciences Dean's List (2025), Division III Student-Athlete (Tufts Volleyball), Elected Graduation Speaker for The Branson School, Class of 2024, California Interscholastic Federation Pursuing Victory with Honor Award (2022), Varsity Volleyball State Champions (2022), NorCal Champions (2022), MCAL Champions (2022, 2023), NCS Champions (2022, 2023), National Latin Exam: Magna Cum Laude (2021), Summa Cum Laude (2023), Maxime Cum Laude (2024)

Relevant Coursework: Entrepreneurial Finance, Intermediate Macroeconomic Theory, Intermediate Microeconomic Theory, Statistics, Principles of Economics, Wall Street Prep: Accounting & Financial Statement Analysis Certification

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Nov 2025 – Present

Selected Transaction Experience

● Privia Health — *Healthcare Services / Value-Based Care Strategic Advisory Simulation*

- Owned Planning Phase market assessment for a value-based care advisory project sponsored by Bank of America, synthesizing regulatory, pricing, and policy uncertainty driving ~22% YoY decline in healthcare M&A activity to frame valuation challenges & evolving buyer behavior
- Analyzed current healthcare deal trends showing a shift toward smaller, more targeted transactions, positioning technology-enabled physician services platforms (including our target, Privia Health) as attractive assets + informing deal size, strategic rationale & execution considerations
- Evaluated Privia Health's operating profile, highlighting revenue growth from ~\$1.0B to ~\$2.1B LTM with high-teens expansion, minimal capex, and positive free cash flow to assess scalability, operating leverage, and downside protection for broader student analyst team of 5
- Identified ~5 key risks including low absolute margins, stock-based compensation dilution, and reimbursement pressure, developing diligence questions on physician retention, margin sustainability, and organic growth to facilitate workstream for teammate owning the modeling section

Hatch Advisors

Summer Intern

Park City, UT

Jul 2025 – Aug 2025

- Conducted targeted outreach to 20+ GPs across private equity, venture, and growth equity, assessing interest in secondary and liquidity solutions to expand the firm's pipeline of actionable opportunities and investor conversations
- Researched fund profiles, strategies, and portfolio performance using industry databases and filings, benchmarking 10–15 funds to identify return drivers, risk factors, and vintage-year dynamics that shape secondary market attractiveness
- Scheduled and participated in weekly meetings with senior advisors to discuss fund research and recommended strategies for LPs, GPs, and private company shareholders navigating the secondary market for flexible liquidity
- Developed client-ready summary materials synthesizing fund analyses, outreach insights, and market trends, equipping senior advisors with data-backed perspectives that strengthen advisory recommendations and secondary deal evaluation

Laurel Street Advisors

Operations Intern

San Francisco, CA

May 2025 – Jul 2025

- Managed daily reception, shipments, returns, and deliveries for 50+ design materials per week, coordinating logistics with vendors and installers to streamline project timelines and reduce fulfillment delays across active client engagements
- Monitored and updated 100+ transaction records between clients and retailers, reconciling order discrepancies, tracking payment status, and ensuring accurate documentation to maintain seamless end-to-end operations
- Scheduled recurring client meetings and coordinated 15–20 in-person consultations, preparing agendas and materials to elevate client experience, strengthen communication, and support higher project conversion and satisfaction rates

EXTRACURRICULARS

The Hidden Opponent | Tufts University

Newsletter Editor

Medford, MA

Aug 2025 – Present

- Format and review monthly mental-health newsletters reaching hundreds of students, faculty, and alumni, ensuring clear communication, engaging design, and accurate reporting on mental-health issues in collegiate athletics
- Coordinate content sourcing, editing, and distribution workflows, integrating 5–7 new stories or resources per issue to elevate awareness, reduce stigma, and strengthen outreach across the Tufts athletic community

Tufts University Volleyball

Division III Varsity Athlete

Medford, MA

Aug 2024 – Present

- Commit to 6-day weekly training schedule including practices, strength sessions, film review, and match play, developing discipline, teamwork, and high-performance consistency in a competitive collegiate environment

Tufts Financial Group

Active Member

Medford, MA

Aug 2024 – Present

- Attend weekly meetings and guest-speaker sessions to gain exposure to investment banking, asset management, consulting, and markets, building foundational technical, analytical, and professional skills for future finance roles

SKILLS & INTERESTS

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

Skills: Agile Methodologies, Project Management Training, Scrum, Public Speaking, Microsoft & Google Applications

Interests: Volleyball, Skiing, Distance Running, Hiking, Mountain Biking, Creative Writing

EDWARD LIAO

Commack, NY | edward.liao@yale.edu | [LinkedIn](#)

EDUCATION

Yale University

Bachelor of Arts in Economics, Pierson College

Expected May 2028

New Haven, CT

- **Related Coursework:** Introductory Microeconomics, Calculus of Functions of One Variable II

Commack High School | Weighted GPA: 102.18 | High Honor Roll

June 2024

International Baccalaureate (IB) Diploma Graduate

Commack, NY

- **Activities:** National Honor Society, National Technical Honor Society, Scholar Athlete Leadership Club

PROFESSIONAL EXPERIENCE

Tennis Instructor

June 2020 - Present

Self-employed

Commack, NY

- Taught private lessons to 10+ clients of varying skill levels, improving their technique, strategy and athletic performance.
- Designed and implemented personalized lesson plans that helped clients improve tournament performance and overall physical fitness.

LEADERSHIP & COMMUNITY DEVELOPMENT

Yale Men's Varsity Tennis

August 2024 - Present

2nd Doubles/5th Singles

New Haven, CT

- Dedicate 15+ hours/week to practice and games during the fall season and 30+ hours/week during winter/spring to training and practice.
- Ranked as high as 15 nationally within the Class of 2024 by TennisRecruiting.net.
- Participate in monthly sessions with NewHytes to mentor underprivileged children through teaching tennis and with schoolwork.

Yale Undergraduate Diversified Investment Group

September 2024 - Present

Member

New Haven, CT

- Participate in weekly educational meetings focused on exploring different investment strategies and portfolio management.
- Attend bi-annual 10-week lecture series featuring Wall Street executives and Yale School of Management professors, focusing on industry insights and holding Q&A sessions.

Yale Entrepreneurial Society

September 2024 - Present

Member

New Haven, CT

- Engage in monthly meetings that focus on discussing successful startups, participating in entrepreneurial workshops, and networking with industry leaders.

USTA Long Island Junior Council

June 2021- August 2024

Suffolk County Representative

Roslyn, NY

- Led and organized 5+ fundraising events throughout Long Island that led to 50+ tennis racquets donations to underprivileged children.

Commack High School Boys Varsity Tennis

February 2018 - August 2023

1st Singles/Team captain

Commack, NY

- **Awards:** 2023 New York State Boys Tennis Champion, USA Today 2023 Boys Tennis Player of the Year for New York, 2023 Long Island Player of the Year, 4x All-State Awards, 3x Suffolk County Champion

SKILLS & INTERESTS

Languages: Mandarin (fluent), Spanish (proficient) | **Interests:** Lifting, Cooking, Origami, Running, NY Bagels

Ella A. Miller

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EDUCATION

Amherst College – Amherst, MA

Bachelor of Arts, American Studies

Expected Graduation: May 2028

Cumulative GPA: 3.92/4.0

Accomplishments: Varsity Women's Squash (*Starter on Top-13 Team Nationally*), Squash Team Representative for Student Athlete Advisory Council, Scholars of Finance Club, Women in Finance Club, Investment Club, Make-Play Foundation (*Diamond League Fellow*)

Relevant Coursework: Calculus, Political Science, Transnational Studies, Wall Street Prep: Accounting & Financial Statement Analysis Certification

Programs: The London School of Economics and Public Policy (*Summer Program | Comparative Economics | July 2024 – Aug 2024*)

PROFESSIONAL EXPERIENCE

Guggenheim Securities

MAP Investment Banking Fellow

Selected Transaction Experience

Vuori — ~\$5.5B Implied Enterprise Value (*Private Equity Acquisition Simulation*)

- Led the planning phase of a live Consumer & Retail M&A case by framing the acquisition thesis for **Vuori**, defining diligence priorities, market scope, and value-creation hypotheses, earning Top 12 Performer recognition out of 60+ fellows for strategic clarity and judgment
- Developed structured investment frameworks evaluating industry dynamics, competitive positioning, and growth drivers, anchoring analysis to premium activewear tailwinds, ~7% category CAGR, international expansion opportunities, and Vuori's projected 20–25% revenue growth
- Prepared planning-stage valuation inputs by synthesizing financial summaries, peer benchmarks, and transaction context, supporting a ~\$5.5B enterprise value range consistent with public comparables, precedent transactions, and sponsor-backed funding history
- Presented planning conclusions and preliminary recommendations in a 10-slide client-ready deck to Guggenheim Consumer & Retail bankers (Grace Gozdecki & Payton Ahola), earning top-tier feedback for poise, communication, and the ability to clearly explain valuation drivers, risks, and tradeoffs

Remote

Sep 2025 – Dec 2025

William Hood & Company

Summer Analyst

- Supported execution and pitching efforts on 8 live M&A transactions and 3 sell-side pitches in the consumer sector, preparing client-facing materials and interacting with senior bankers throughout transaction and business-development processes
- Built DCF and LBO valuation models and drafted sections of an 80-page Confidential Information Memorandum, contributing to financial analysis, valuation support, and management-presentation materials used in active client discussions
- Researched and curated buyer lists, transaction comparables, and data packs across targeted consumer sub-sectors, supporting due diligence, strategic positioning, and marketing outreach for multiple concurrent deal teams

New York, NY

Jun 2025 – August 2025

Guggenheim Securities

Freshman Day on the Job Participant

- Participated in a two-day investment banking immersion program, engaging with Guggenheim analysts and senior professionals to understand M&A advisory, capital-raising workflows, and the day-to-day responsibilities of junior bankers
- Developed foundational professional communication and industry knowledge by attending analyst-led seminars and interactive discussions, gaining early exposure to client service expectations, transaction lifecycles, and recruiting pathways at a global investment bank

Remote

Apr 2025 - Apr 2025

Bento Engine (Fintech)

Summer Intern

- Conducted and synthesized competitor research on product offerings, value propositions, and brand positioning across the fintech landscape, developing structured market analysis used to inform internal strategic discussions
- Prepared a 50-page research deck distilling competitive insights and presented findings to the senior leadership team at a firm offsite, demonstrating professional communication and the ability to translate analysis into executive-ready recommendations

Remote

Jul 2023 – Aug 2023

LB Squash Summer Camp

Volunteer Camp Counselor

- Led ~5 hours of daily instruction for youth athletes through drills and training sessions, demonstrating leadership, clear communication, and the ability to manage groups in a structured, fast-paced environment
- Planned and coordinated 5+ daily activities while supervising participants across multi-week sessions, reinforcing responsibility, professionalism, and sound judgment when operating with limited supervision

Greenwich, CT

Jun 2022 – Jul 2023

EXTRACURRICULARS

Amherst Women's Squash Team

Student-Athlete

- Compete as a varsity student-athlete while committing 20+ hours per week to training, practice, and competition, building on a national championship-level high school career; apply leadership, discipline, and competitive experience developed as a Top 25 nationally ranked junior
- Uphold high academic and athletic standards shaped by prior captaincy and scholar-athlete recognition in a competitive team environment

Amherst, MA

Aug 2024 – Present

Greenwich Academy

One Love Club Instructor, SPARC Researcher, Senior Yearbook Editor

- Led health and wellness instruction for grades 9–10 and conducted school culture research through SPARC (UPenn-coordinated), designing surveys, conducting interviews, and presenting findings at an annual conference
- Served as Senior Yearbook Editor, overseeing end-to-end publication design and mentoring younger students to deliver a polished, on-time yearbook

Greenwich, CT

Sep 2021 – May 2024

SKILLS & INTERESTS

Interests: Playing racket sports • Cooking • Traveling • Running (completed a marathon at age 13)

Emory Bozzuti

emory.bozzuti@emory.edu • (206) 734-9622 • linkedin.com/in/emory-bozzuti

EDUCATION

Emory University, Goizueta Business School

Bachelor of Business Administration, Finance & Marketing

Cumulative GPA: 3.75/4.00

Relevant Courses: Corporate Finance, Financial Accounting, Business Economics, Data & Decision Analytics, Marketing

Atlanta, GA

May 2028

WORK EXPERIENCE

Goizueta Business School

Research Assistant

Atlanta, GA

Jun. 2025 – Present

- Support faculty research initiatives at Goizueta Business School under Dean of Faculty and Research, Wei Jiang
- Assist with seven faculty-led projects including database analysis, categorization in excel, and literature review
- Build research skills through hands-on tasks focused on efficiency, organization, and collaboration with faculty

Goizueta Investment Management Group (GIMG)

Equities Analyst

Atlanta, GA

Feb. 2025 – Present

- Collaborate with a team of five to strategically manage a \$350K+ portion of Emory University's endowment fund
- Perform technical and fundamental research analysis on healthcare companies Alnylam and Vera Therapeutics
- Develop two pitch decks within the healthcare industry team, utilizing excel for intrinsic and external valuations

Child Care Provider

Nanny

Seattle, WA

May 2021 – Aug. 2024

- Provided care for two small children (ages six and nine) developing time management and organizational skills
- Helped consistently run errands, completed household-related activities, and facilitated extra-curricular pursuits
- Managed daily routines, including meal preparation, transportation, as well as wake-up and bedtime schedules

LEADERSHIP & COMMUNITY INVOLVEMENT

Goizueta BBA Council

VP of Finance

Atlanta, GA

May 2025 – Present

- Coordinate and lead weekly financial meetings with all BBA Council executives to align on budgets and initiatives
- Manage an allocation of a \$140K+ annual budget across 30+ BBA organizations serving 500+ business students
- Volunteer at all Thursday KEGS events, supporting community bonding and student engagement across Goizueta

Make a Play Foundation (MAP)

Bank of America Winter Investments Fellow | Remote

Atlanta, GA

Nov. 2025 – Present

- Selected as 1 of 20 NCAA athletes nationwide for a 10-week investment banking fellowship sponsored by BofA
- Deliver 10+ weekly assignments covering concepts in accounting, valuation, in addition to transaction analysis
- Expected to participate in a case competition advising a private equity client on a healthcare acquisition target

Emory University Varsity Soccer

NCAA Student-Athlete

Atlanta, GA

Aug. 2024 – Present

- Start in nine games, averaging 45 minutes per game for 22 games and scoring the third most goals on the team
- Play a key role in helping to lead the team to the NCAA Final Four in Las Vegas, ultimately placing third nationally
- Demonstrate discipline, balancing coursework with year-round practices, conditioning, and film sessions daily

Seattle Adaptive Sports (SAS) Volunteer

Power Soccer Head Coach

Seattle, WA

Oct. 2021 – Jan. 2024

- Coached a team of 11 wheelchair-bound athletes (age 5-35) for three hours each Sunday, seven weeks per season
- Adapted to communication barriers for non-verbal athletes, learning to read body language and facial expression
- Supported the SAS program by creating digital posters to raise awareness, recruiting two other coaches to the team

ADDITIONAL INFORMATION

Other Activities: Kappa Alpha Theta, AKPsi Business Fraternity, GWIF Undergrad Rep, GIBC, Summer Study Abroad (Italy)

Honors & Awards: Two-Year UAA Conference All-Academic Athlete, NCAA Final Four Placement for 2024 Soccer Season

Skills: CPR Certified, Piano, FactSet (Intermediate), Bloomberg Terminal (Basic), Office Suite, MS Excel (Intermediate)

Interests: Reading (Hunger Games), Music (Kaytranada, Old Dominion), Baking (Strawberry Shortcake), Snowboarding

GRACE H. CHRAPOWITZKY

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EDUCATION

Massachusetts Institute of Technology – Cambridge, MA

GPA: 5.0/5.0

B.S. in Mathematical Economics | B.S. in Finance | ACT/SAT: 1520

Anticipated Graduation: 2028

- Relevant Courses: Calculus (I,I,III), Microeconomic Theory, Macroeconomic Theory, Managerial Finance, Laboratory in Corporate Investments, Accounting, Statistical Methods in Economics

PROFESSIONAL EXPERIENCE

MIT Sloan – *Monetary Policy Researcher* | Cambridge, MA

06/2025 – Present

- Evaluate impact of monetary policy on regional economies by conducting interviews with state budget officials to understand fiscal strategy and capital allocation in all 50 states and in US territories
- Model state data from capital expenditure plans to see how interest shifts influence capital investment, debt issuance, and regional economic performance
- Interpret bond-funded infrastructure and balance sheets to form a macro-to-micro understanding of investment drivers

MIT Health Innovation Group – *Healthcare Innovation Researcher* | Cambridge, MA

01/2025 – 03/2025

- Analyzed financial and capital structures of ~ 1000 healthcare startups connected to MIT and Greater Boston ecosystem to understand investment trends in innovation
- Co-created a macro to run data visualizations linking venture funding, partnership models, and startup growth across healthcare sectors
- Presented findings twice a week to larger cohort of researchers and advisors, conveying technical information in powerpoint format

MIT Admissions Office – *Tour Guide* | Cambridge, MA

05/2025 – Present

- Deliver 1.5 hour tours of the MIT campus to groups of 30-60 prospective students and their families, describing the institute's academic programs, student life, and culture
- Hone public speaking skills to effectively communicate with large groups
- Answer questions to provide personalized insights to visitors, supporting MIT's undergraduate recruitment

McCarroll's Village Butcher – *Cook, Butcher, and Deli Clerk* | Delmar, NY

03/2024 – 08/2024

- Effectively managed time in a busy environment and provided customer service by greeting patrons and taking and preparing ~ 90 orders a day from 7AM to 4PM

LEADERSHIP & COMMUNITY DEVELOPMENT

Make a Play Foundation – *Legacy Bowl Fellow* | remote

09/2025 – Present

- Selected as one of 20 Fellows (top ~10% of 200+) in MAP's Legacy Bowl, contributing to a 5-member team developing MS's Parametric Custom Core Strategy projected to engage 500+ high-net-worth athletes and entertainers by 2026.
- Assess risks, benefits, and market demand for a \$250K-minimum investment product tied to professional sports leagues, informing product-market fit and client segmentation
- Manage 20+ deliverables during my phase of the project, taking ownership of timelines and quality control to ensure 100% on-time submission and client-ready standards

MIT Varsity Field Hockey – *Attacker* | Cambridge, MA

08/2024 – Present

- Compete as a Division III varsity athlete, balancing ~20 hours of weekly training and travel, exercising discipline, and strong time management
- Contribute through offensive performance as an Attacker, developing skills in strategic thinking, fast decision-making, flexibility, and goal-oriented execution
- Collaborate with 25 teammates to execute complex strategies under pressure, strengthening communication, adaptability, and leadership in high-stakes competitive environments

Kappa Alpha Theta – *Social Deputy* | Cambridge, MA

08/2024 – Present

- Coordinate communication with other organizations and within the chapter, utilizes organizational skills to foster unity within the chapter by managing events for over 90 sorority members
- Encourage excitement surrounding chapter involvement to strengthen community among sisters

Little Beavers Running Club – *Coach* | Cambridge, MA

09/2024 – Present

- Volunteer weekly to run with elementary-age children on the autism spectrum from the Greater Boston area, fostering fitness and social engagement through individualized support

BCHS Backpack Program – *Volunteer* | Delmar, NY

9/2020 – 06/2024

- Volunteered weekly to pack food bags for underprivileged families in the Bethlehem Central Public School district, including the high school, middle school, and five elementary schools

NON-TECHNICAL SKILLS & INTERESTS

- Skills and Language(s): French (biliterate), Market Research, valuation (DCF), PitchBook, Government Bond Financing, Macroeconomic Trend Analysis, public speaking, communication, leadership (high school student body president of 800 people)
- Programs: Excel/PowerPoint, Python
- Interests: Books (Freakonomics, Jane Eyre, Frankenstein, A Tree Grows in Brooklyn), Chocolate Covered Raspberries, Mob Movies, Marvin Gaye

Henry Koike-Sieira

Mobile: +1 (346) 417 1560 | Email: hck2122@columbia.edu

EDUCATION

Columbia University

New York, NY

- Major: Financial Economics | Minor(s): Applied Mathematics, Film
 - Cumulative GPA: 3.6 | Dean's List
 - Relevant Coursework: Linear Algebra, Calculus Based Statistics, Intermediate Microeconomics, Intermediate Macroeconomics, Calculus 3, Principles of Economics.

Expected May 2028

Hunter College High School

New York, NY

- Public High School
 - GPA: 94/100 | SAT: 1530
 - Activities: Hunter's Organization of Latin Americans, Peer Leader (1 of the 18 chosen out of grade), Precipice Magazine (Editor and Writer).

2020 - 2024

PROFESSIONAL EXPERIENCE

Capital One

McLean, VA

- Incoming Business Analyst Intern
 - Will build analyses (SQL) to inform initiatives in card rewards transparency, security features, marketing optimization, and mobile app UX.
 - Communicate findings in a final presentation; communicate trade-offs and recommendations to cross-functional partners (product, tech, risk) to drive next-step actions.

June 2026 - August 2026

Columbia Economics Department

New York, NY

- Administrative Assistant
 - Managed departmental inventory and expenses spreadsheets. Worked with professors and department staff on clerical and academic projects.

January 2025 - Present

Legendary Ventures

New York, NY

- Venture Scout
 - Evaluated early-stage consumer and retail tech startups by analyzing their business models, team traction, and Fundraising. Represented LV for in person and virtual events with founders and VC investors.
 - Conducted diligence on growth, unit economics, and customer acquisition strategies.

September 2025 - Present

Paradis in the Park

New York, NY

- Bartender and Server
 - Oversaw daily operations during solo shifts exceeding 10 hours, serving 100+ customers per day.
 - Trained new hires on service efficiency and POS systems; commended by management via client feedback emails.

June 2025 - August 2025

Make-A-Play Foundation

New York, NY

- Winter Fellow
 - Built KPI-driven pitch deck for Sixth Street Partners, modeling attendance growth, sponsorship revenue, and player-development ROI in women's soccer.
 - Selected from 200+ candidates; advanced to Phase 2 based on project performance and presentation quality. After completing the program returned to interview future participants.

January 2025 - July 2025

National Labor Relations Board

New York, NY

- Student Ambassador
 - Became knowledgeable with the history of labor rights and the workings of the NLRB during the education phase of the program.
 - Collaborated with regional directors and professors in the field to found and host a labor law conference at my school with 300+ attendees. Outlined a way to implement that conference across the NYC public school system, selected by school to attend the Human rights day at the United Nations as a result.

May 2021 - July 2021

Figueiredo Farm

Palmeira, Galicia, Spain

- Farmhand
 - Managed seasonal agricultural operations and livestock logistics; ensured 100% of animals met sale standards.
 - Repaired equipment and optimized harvest workflow to maintain consistent output across climate shifts.

Summers of 2022 - 2024

LEADERSHIP & COMPETITIVE SPORT

NCAA Division I Student Athlete

New York, NY

- Columbia Men's Cross Country and Track Team
 - Currently running 90-100 miles/week as the team's top runner for Cross Country this season.
 - Dedicate 25+ hours a week to practice, competition, rehab weight training, and team activities.

2024-Present

ADDITIONAL INFORMATION

- **Skills:** Spanish (native speaker), Windsurfing, Spanish Poetry.

Isaac Friedman

(917) 658-0861 | Isaac.Friedman@Tufts.edu | Larchmont, NY

EDUCATION

Tufts University

Medford, MA

Bachelor of Arts in Quantitative Economics, Minor in Finance

Expected May 2028

- **GPA:** 3.97/4.00 | **Honors:** Dean's List (All Semesters), NESCAC All-Academic
- **Relevant Coursework:** Principles of Economics, Intermediate Microeconomics, Calculus, Intro to Finance, Preparing New Leaders

Millbrook School

Millbrook, New York

High School Diploma

June 2024

- **GPA:** 4.00/4.00
- **Awards:** High Honor Roll, AP Scholar

Mamaroneck High School

Larchmont, New York

High School Diploma

June 2023

- **GPA:** 4.00/4.00
- **Awards:** High Honor Roll, AP Scholar with Honors

PROFESSIONAL EXPERIENCE

Billy & Pete's

Larchmont, NY

Server

May 2025 – August 2025

- Delivered attentive and friendly table service in a fast-paced, high-volume restaurant environment
- Managed multiple tables at once while maintaining high standards of customer satisfaction
- Processed payments efficiently, handling cash and credit transactions with complete precision and accountability.

IsaacFBasketball

Larchmont, NY

Founder, Trainer

May 2023 – Present

- Secured gym rental through networking with local facilities and organized a summer-long basketball clinic, coaching players in daily sessions
- Trained players of all skill levels while curating personalized on-court and weight training programs for individual and group sessions
- Reached summer client goal by recruiting through social media postings and personal networking

Larchmont Shore Club

Larchmont, NY

Head Camp Counselor

May 2021 – August 2023

- Supervised and led daily activities for groups of 30+ campers, ensuring safety and engagement
- Managed and trained a team of junior counselors, delegating responsibilities and providing mentorship
- Communicated regularly with parents and staff to provide updates on camper progress and resolve concerns

LEADERSHIP EXPERIENCE

Tufts Varsity Men's Basketball

Medford, MA

NCAA Student-Athlete

September 2024 – Present

- Compete for a nationally ranked top 10 team that consistently qualifies for the Division III NCAA National Tournament
- Dedicate 25+ hours per week to games, practices, individual skill sessions, weightlifting, and team meetings
- Earned NESCAC All-Academic honors for excelling academically while competing as a student-athlete in season

Millbrook School Varsity Basketball

Millbrook, NY

NEPSAC Student-Athlete

September 2023 – May 2024

- Selected Team Captain; provided leadership on and off the court by setting team standards, mentoring younger players, and working closely with the coaching staff
- Earned All-NEPSAC Honors in one of the most competitive prep school basketball leagues in the country
- Led team to the NEPSAC Championship, marking the farthest postseason run in school history

SKILLS & INTERESTS

Languages: English (Native), Spanish (Proficient)

Skills: Microsoft Excel, Microsoft PowerPoint, Microsoft Word, Google Product Suite

Interests: Tennis, Weight Training, Coldplay, Fashion, Global Markets

ISABEL O. MORGAN

[HTTPS://WWW.LINKEDIN.COM/IN/ISABEL-MORGAN-655295323](https://www.linkedin.com/in/isabel-morgan-655295323) | (847) 909-9536 | IM6003@PRINCETON.EDU

EDUCATION

- Princeton University** | Princeton, New Jersey **B.A. expected May 2028**
B.A. in Economics | Minor in Finance
- GPA: 3.67/4.00
 - Relevant Courses: Introduction to Microeconomics, Introduction to Macroeconomics, Mathematics for Economics and Life Sciences, Introduction to Comparative Politics, Advanced Spanish
- London School of Economics** | London, United Kingdom **Summer 2025**
• Relevant Courses: Principles of Accounting, Business Analysis and Valuation
- New Trier High School** | Winnetka, Illinois **Graduated May 2024**
High School Diploma
- GPA: 3.81/4.00

PROFESSIONAL EXPERIENCE

- Houlihan Lokey, Inc.** – *Incoming Investment Banking Boot Camp Participant* | New York, New York **May 2025**
- Complete 40+ hours of intensive training in valuation methods, DCF modeling, and transaction structuring.
 - Collaborate with peers in case studies simulating real-world M&A and restructuring scenarios.
 - Learn from firm leadership to build foundational technical and industry knowledge for banking.
- New Trier High School** – *Summer Field Hockey Coach* | Winnetka, Illinois **Summer 2024**
- Coached 80+ athletes across age groups, creating training plans to develop performance and discipline.
 - Led daily operations, scheduling, and team communications to deliver efficient and consistent sessions.
 - Mentored players in leadership and resilience, supporting team cohesion and individual growth.
- New Trier Field Hockey Media Manager and Graphic Designer* **August 2021 – May 2024**
- Designed social media campaigns using Canva and Photoshop to boost team engagement and branding.
 - Managed digital communications across platforms, keeping athletes and families informed.
 - Collaborated with coaching staff to align messaging, increasing visibility of team events and achievements.
- Summer Field Hockey Camp** – *Founder and Camp Leader* | Wilmette, Illinois **Summer 2023**
- Launched and operated a youth camp, earning \$1,500 in revenue and reaching 20+ young athletes.
 - Created Excel-based P&L models and tracked registration to streamline budgeting and operations.
 - Led coaching, logistics, and curriculum development while managing marketing efforts.

ACTIVITIES & LEADERSHIP EXPERIENCE

- Division One Field Hockey, Princeton University** – *Athlete* | Princeton, New Jersey **August 2024 – Present**
- Accomplishments: 2024 Ivy League Champions, NFCA National Academic Squad (2024)
 - Commit 30+ hours weekly to practice, competition, and travel while maintaining academic performance.
 - Excel in high-pressure environments, developing resilience, focus, and performance consistency.
 - Collaborate across a diverse team, contributing to strategic gameplay and team success.
- USA Field Hockey** – *Junior National Team Member* | Charlotte, North Carolina **January 2022 – Present**
- Selected through national tryouts and represented the U.S. in international competitions.
 - Managed demanding training, travel, and academic schedules, honing multitasking under pressure.
 - Attend monthly camps to develop elite performance habits and leadership within high-stakes settings.
- MAP x Sixth Street** – *“Pick Six” Alternative Investments Fellow (Phase 1 & 2)* | Remote **March 2025 – Present**
- Phase 1: Participated in 3 weeks of interview preparation for high-achieving college athletes. Competed in 3 mock interviews to implement learnings from 10+ hours of preparation, and earned a top spot on MAP’s leaderboard rankings
 - Phase 2: Collaborate with a team of 6 to recommend a new premier women’s soccer club to Sixth Street; conduct deal analysis and develop a value-add strategy to ensure the potential acquisition aligns with the firm’s investment strategy
- Opportunity GrantED** – *Fundraising Chair of Junior Board* | Wilmette, Illinois **January 2023 – May 2024**
- Fundraised to provide classroom supplies to underserved classrooms in Chicago schools.
 - Collaborated with board members to execute fundraisers supporting Opportunity GrantED’s mission.
 - Led a community workout event, generating \$1,000+ to support Opportunity GrantED.

SKILLS & CERTIFICATIONS

- Skills: Leadership, problem-solving, initiative, creativity, organization, communication, and teamwork
- Languages: Spanish – professional proficiency
- Technology: Excel, PowerPoint, Word, Canva, and Photoshop
- Interests: Traveling, running, baking, puzzle games, current affairs, and watching sports

Jamie K. Reidy

+ (603) 316-1091 | jreidy@college.harvard.edu | [Linkedin.com/in/jamiereidy17](https://www.linkedin.com/in/jamiereidy17)

EDUCATION

Harvard University

Bachelor of Arts, Applied Mathematics and Economics

Cambridge, MA

Expected Graduation: May 2028

- **GPA:** 3.93/4.0 | **SAT:** 1540
- **Accomplishments:** NCAA D1 Student-Athlete (Harvard Women's Lightweight Rowing); Highest Academic Honors, Academic Achievement Awards in Economics, Math, and French (Phillips Exeter Academy), Guggenheim Securities (Investment Banking Sophomore FOCUS Program)
- **Relevant Coursework:** Computational Thinking and Problem Solving, Introduction to Probability, Linear Algebra and Differential Equations, Multivariable Calculus, Quantitative Methods for Economics, Wall Street Prep: Accounting & Financial Statement Analysis Certification

PROFESSIONAL EXPERIENCE

Guggenheim Securities

Investment Banking Sophomore FOCUS Participant

Remote | New York, NY

Dec 2025 – Present

- Selected to participate in Guggenheim Securities' Sophomore FOCUS Program, engaging in intensive information sessions, educational panels, and networking discussions designed to develop investment banking acumen, accounting fundamentals, and professional judgment in a selective cohort
- Paired with a full-time Guggenheim banker mentor and completed structured programming emphasizing ownership, attention to detail, and communication, earning an in-person interview for the 2027 Summer Analyst Program following successful completion of all program requirements

Guggenheim Securities

MAP Investment Banking Fellow

Remote

Sep 2025 – Dec 2025

Selected Transaction Experience

- Lululemon Athletica (NASDAQ: LULU) — ~\$45B+ Implied Enterprise Value (Consumer & Retail Valuation & M&A Simulation)
 - Owned the Execution Phase by building fictional integrated financial statements (IS, BS, CFS) and 5-year projections, converting operating assumptions into a final valuation snapshot presented live to Guggenheim C&R analysts [Andrew Pruss](#), [Rhett Young](#), and [Nathan Herrera](#)
 - Constructed valuation analyses using public comparables and precedent transactions, benchmarking **Lululemon** against peers including Nike, On, and Under Armour to evaluate multiple dispersion (~6x–12x) and identify relative upside scenarios under scalable growth assumptions
 - Modeled revenue growth from ~\$10.5B LTM to ~\$11.2B (2026E) and sustained ~27% EBITDA margins, incorporating DTC mix, international expansion & cost discipline to support enterprise value sensitivity across base & downside cases under conservative assumptions
 - Prepared and delivered a client-ready valuation snapshot synthesizing financials, peer positioning, and multiple outcomes, demonstrating advanced proficiency in Excel-based modeling, valuation judgment & professional presentation under live evaluation settings by Guggenheim

Panoplia Laboratories

Research Protocol Technician

Cambridge, MA

Jun 2025 – Aug 2025

- Conducted research evaluating whether large language models can assist with core biology tasks, supporting improved lab efficiency and data quality
- Applied AI Prompt Engineering techniques to guide LLM outputs for experimental workflows, producing higher-quality, reproducible research data
- Earned certification in AI Prompt Engineering for Research, demonstrating technical fluency at the intersection of biology and artificial intelligence

Harvard Summer School

Proctor

Cambridge, MA

Jun 2025 – Aug 2025

- Mentored 11 high school students through 1:1 meetings and group study sessions, supporting academic adjustment and community integration
- Led off-campus trips and residential programming, demonstrating leadership, judgment, and responsibility in a student-facing environment

Community Rowing, Inc.

Summer Coach

Boston, MA

Jun 2024 – Aug 2024

- Coached learn-to-row and skill-development classes for 12–16-year-old athletes, combining technical instruction with structured fitness training
- Led daily practices focused on stroke technique, teamwork, and safety, supporting skill progression in a youth training environment

Hampshire Family Office

Summer Intern

Boston, MA

Jul 2022 – Aug 2022

- Supported the Head of Research on alternative investment and SMA portfolios, assisting with research, monitoring, and portfolio review activities
- Coordinated follow-ups with external investors in response to client inquiries, strengthening communication and relationship management processes

LEADERSHIP & EXTRACURRICULARS

Harvard-Ratcliffe Lightweight Crew

Varsity Rower

Cambridge, MA

Aug 2024 – Present

- Balance 20+ hours per week of Division I training, competition, meetings, and travel alongside a rigorous academic course with sustained excellence
- Achieved 1st place in the Lightweight Eight at Head of the Charles Regatta and runner-up in the Varsity 8+ at the 2025 IRA National Championship
- Rank as a Top-10 Division I lightweight rower (For Stars Network, 2026) and hold American records in the 4-minute and 1000-meter erg events

Harvard Smart Woman Securities

Director of External Operations; Investment Analyst

Cambridge, MA

Feb 2025 – Present

- Serve as primary liaison for sponsors, leading outreach to secure funding and communicating professional and networking opportunities to members
- Delivered 2-5 stock pitches within an industry group for a \$45,000 investment portfolio, applying financial modeling and valuation frameworks
- Secured 3 keynote speakers and ~10 panelists for a 100+ attendee Women in Finance Conference, moderating two buy-side panels with professionals from top banks – Allen & Company, UBS, and Warburg Pincus – while managing speaker coordination, agendas, and live discussion flow

Harvard Women in Business

Membership Development Committee Member

Cambridge, MA

May 2025 – Present

- Run a 10-week WIBternship program for prospective members, featuring weekly industry-focused panels across diverse business sectors
- Identify and engage external speakers & organize weekly group sessions with senior members to facilitate mentorship and professional development

SKILLS & INTERESTS

Technical Skills: AI prompting, RStudio, Python, Microsoft Office | **Interests:** Hiking, ice skating, karate, poetry, weightlifting, yoga

Jason K. Bright

jason.bright@emory.edu | (516) 350-3449 | www.linkedin.com/in/jasonkbright/

EDUCATION

Emory University, Goizueta Business School | Atlanta, GA

GPA: 3.82/4.0

Bachelor of Business Administration, Finance | Minor in Sociology

May 2028

- Accomplishments: 2025 Emory NAACP Athlete of the Year Nominee, 2025 UAA Men's Track & Field Outdoor Champion
- Scholarships: 2024 Alpha Phi Alpha Fraternity, Inc. Eta Theta Lambda Chapter MLK Leadership Scholarship
- Relevant Courses: Business Data & Decision Analytics; Accounting: The Language of Business; Principles of Macroeconomics, Microeconomics; Marketing Management; Business Communication Strategy; AWS and Cloud Computing with AI

Collegiate School – *High School Graduate* | New York, NY

Sept. 2019 – May 2024

EXPERIENCE

Goizueta Venture Capital – *Analyst* | Atlanta, GA

Oct. 2025 – Present

- Conduct pro bono sourcing and due diligence within the supply chain sector for the Engage Fund, managed by Tech Square Ventures, evaluating Seed, Pre-Seed, and Series A technology companies across the Southeast to identify investment opportunities
- Develop early-stage investing expertise by performing comprehensive market analysis, building investment theses, assessing competitive landscapes, and applying strategic sourcing techniques to support pipeline development and portfolio growth

Linden Global Strategies – *Investment Management Summer Analyst* | New York, NY

Jun. 2025 – July 2025

- Curated and presented daily market updates to a 10+ member investment team, including Managing Principal; updates featured geopolitical analyses and aggregated insights from LGS Partners (e.g., Apollo, Oaktree)
- Composed an RFP response for prospective client covering 5 domains—investment approach, risk management, manager due diligence, portfolio construction, and performance reporting—prompting a follow-up meeting
- Analyzed India-focused ETF investment case and prepared briefing for executive team covering 30+ holdings across 8 sectors, macro trends, and long-term positioning for use in emerging market allocation to support potential client portfolio diversification

Entrepreneur – *Founder* | New York, NY

May 2020 – Sept. 2022

- Launched and operated a hybrid resale business specializing in high-demand tech hardware and consumer goods through e-commerce and in-person channels, leveraging automated software to scale profitability and operational efficiency
- Generated \$130K+ in gross revenue and \$24K+ in profit in one fiscal year through arbitrage of high-demand consumer goods

LEADERSHIP & PROFESSIONAL DEVELOPMENT

MAP x Morgan Stanley – *“Legacy Bowl” Wealth Management Fellow* | Remote

Oct. 2025 – Present

- Selected as Captain after finishing top 1% of 250+ MAP athletes, advancing to lead a team of 5 on MS's Parametric Custom Core Sports Legacy Strategy adoption thesis for high net-worth athletes and entertainers
- Build a 2-slide opening set quantifying HNW athlete/entertainer TAM/SAM/SOM, segment growth, and advisor coverage

KKR & Co. Inc. – *2025 KKR Scholar* | New York, NY

May 2025 – Present

- Selected for an exclusive scholars mentorship program gaining exposure to the firm's global platform through executive panels and case studies within areas of the firm, including Global Client Solutions, Infrastructure, Real Estate, Capital Markets, and Insurance

Emory Black Student Athlete Group – *Vice President, Treasurer* | Atlanta, GA

Apr. 2025 – Present

- Manage a \$2,000 annual budget to support student programming while ensuring compliance with university funding policies
- Orchestrate impactful initiatives to foster community, build belonging, and elevate the overall experience for 200+ student-athletes

SEO Career – *Alternative Investments & Investment Banking Track + Markets Track* | New York, NY

Feb. 2025 – Present

- Training spans M&A, valuation, Excel modeling, accounting, portfolio construction, fixed income, bond yields, and equities
- Completed academic research on institutional investment approaches, asset allocation models, and product strategy positioning

OTHER SKILLS & INTERESTS

- Affiliations: NCAA DIII Track & Field Athlete, Emory Economics Investment Forum Member, Emory Goizueta Black Student Association Member, Tangled Natural Hair Club Freshman Representative, Emory Black Male Initiative Fellow
- Certifications: Wall Street Prep PE Deal Process & LBO Modeling (Private Equity Masterclass), Wall Street Prep Demystifying Venture Capital Term Sheets & Cap Tables, Bloomberg Market Concepts, Wall Street Prep Leveraged Buyout (LBO) Modeling
- Skills/Language: MS Excel, MS Word, MS PowerPoint, PC Building, French (Limited Working Proficiency)
- Interests: NY Knicks, Manchester United, Mixed Martial Arts, European sports cars, Technology, Food, Dogs, Cologne collector

JULIA STERLING WIDEN

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EDUCATION

Johns Hopkins University – Baltimore, MD

GPA: 3.88/4.0

B.A. Economics & International Studies | Minors: Financial Economics, Visual Art | ACT: 34 Expected Graduation: May 2028

Honors: Dean's List; Division III National Academic Squad; Aronson Grant Summer Recipient '25 Language Immersion.

Relevant Courses: Elements of Macroeconomics, Elements of Microeconomics, Calculus, Statistics, Macroeconomic Theory.

RESEARCH & PROFESSIONAL EXPERIENCE

Johns Hopkins Institute for Applied Economics – *Research Assistant* | Baltimore, MD

12/2024-Present

- Collected real-time black-market exchange rates in 15+ African and Asian currencies for Steve Hanke's (former White House advisor) Troubled Currency Project by maintaining a live database and applying the Hanke PPP method.
- Authored weekly memoranda and twitter posts for Hanke's 805K+ twitter followers, shaping public commentary on troubled currencies and emerging-market inflation.

Make a Play Foundation (MAP) Pro Bowl Games– *Women's Playmaker* | Remote

12/2024-Present

- Led the "control-phase" workstream; delivered 10+ deliverables and 4 exec-ready outputs; built a 3-statement KPI model; ran weekly retrospectives to improve execution.
- Top 60 selectee; competed in interviews, quizzes, and firm scouting; strengthened modeling and deal framing.

Challenge Camps – *Aquatics Manager* | New Rochelle, NY

05/2023-08/2025

- Managed 10 lifeguards and led daily swim instruction for 120+ campers, designing and executing the swim curriculum, assessing every camper individually, and completing 240+ Red Cross evaluations each summer.
- Created lifeguard schedules, tracked attendance, ensured compliance with NY safety protocols, and resolved parent concerns.

LEADERSHIP & CAMPUS INVOLVEMENT

Students Consulting for Nonprofit Organizations (SCNO) – *Analyst* | Baltimore, MD

09/2024-Present

- Consulted for Art with a Heart, Bea Gaddy Family Centers, and Peaceful Warriors on operational improvements and fundraising strategy.
- Created flyers, website pages, and advertisements, drafted grant proposals, and presented deliverables to nonprofit leadership.

Johns Hopkins Women in Business – *Corporate Development Co-Chair* | Baltimore, MD

09/2024-Present

- Led general body meetings with 50+ members and coordinated resume workshops and speaker panels.
- Built and managed relationships with 10+ alumni and companies to organize recruiting events and networking sessions.

Run Your City Baltimore – *Volunteer* | Baltimore, MD

09/2024-Present

- Volunteered weekly to organize inclusive running programs for 430+ local K–8 students; collaborated with Hopkins Track & Field teammates to promote fitness and community.

Jardín Infantil Tu Mundo de Colores – *Volunteer* | Coronado, Costa Rica

06/2025-07-2025

- Volunteered 40+ hours at a Costa Rican orphanage/daycare during a month-long study abroad; supported children ages 6 months–12 years, including those with special needs.

St Luke's Philanthropic Society – *President* | Lakeville, CT

09/2020-05/2024

- Led 5 blood drives (347 pints total; state record: 89 in one), raised \$15K+ for local charities, and ran 13 free youth sports clinics; Recipient of the Frank A. Spole 38 Social Service Prize (2024).

ATHLETICS

Johns Hopkins University – *Varsity Field Hockey & Track and Field* | Baltimore, MD

08/2024-Present

- The only dual-sport NCAA athlete in Hopkins' Class of 2028; Member of 3 Centennial Conference Championship teams: Field Hockey (2024), Indoor Track (2025), Outdoor Track (2025).
- Competed as a forward in the NCAA Elite Eight; placed 6th in the pentathlon (Indoor Championships) and 5th in the heptathlon (Outdoor Championships).

SKILLS & INTERESTS

- Skills & Certifications: Spanish (Professional Working Proficiency), Word, Excel, PowerPoint, public speaking; certified in Bloomberg Market Concepts, Wall Street Prep Accounting Crash Course, WSI, Lifeguard, First Aid & CPR. Engaged in early insight programs for Goldman Sachs, Peakspan Capital, Mercer, and Susquehanna.
- Interests: Digital & Analog Photography, Reading Memoirs, Baking, Cooking, Current Events, Hiking & Travel.

Julie Piot

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EDUCATION

Yale University – New Haven, CT

Bachelor of Arts in Economics & Data Science Certificate | SAT: 1590

Expected Graduation: June 2028

Cumulative GPA: 3.80/4.0

- **Awards/Accomplishments:** Student-Athlete (Yale Women's Track & Field), National Merit Finalist, U.S. Presidential Scholars Candidate, AP Scholar with Distinction, Edward Foundation Scholar, Scholar Student-Athlete of the Year (2024)
- **Relevant Coursework:** Financial Economics, Econometrics, Data Analysis, Game Theory, Linear Algebra with Applications, Probability Theory, Microeconomics, Macroeconomics

PROFESSIONAL EXPERIENCE

RoundTable Healthcare Partners

Incoming Private Equity Summer Analyst - IVCA Scholar

Lake Forest, IL

Jun 2026 – Aug 2026

- Expected to complete Adventis certification covering three-statement modeling, DCF valuation, and LBO analysis across 6+ case modules to build technical readiness for supporting live diligence/portfolio monitoring activities within \$3.3B healthcare-focused fund
- Expected to support investment diligence and portfolio analysis for 2–3 healthcare companies by evaluating financial performance trends, competitive dynamics, and strategic risks to strengthen screening decisions and ongoing monitoring workflows

Argonne National Lab

Data Science Summer Intern - Science Undergraduate Laboratory Internships

Lemont, IL

Jun 2025 – Aug 2025

- Developed Python-based tools to process and analyze large scientific datasets, improving model reliability and accuracy across 10K+ data points to support researchers' ability to draw statistically sound conclusions for ongoing studies
- Delivered weekly presentations to senior scientists summarizing analytical findings and methodological decisions, contributing to a publication-ready dataset and strengthening the lab's ability to communicate research insights to technical audiences

Munchies Plus

Assistant Manager

Naperville, IL

Jun 2024 – Aug 2024

- Managed daily operations and train a team of 5 employees, optimizing inventory levels across 100+ SKUs to reduce stockouts during peak periods and improved service efficiency and customer throughput across high-volume hours

Edward Hospital

Patient Service Assistant

Naperville, IL

May 2022 – May 2024

- Supported intake and discharge workflows for ~30 patients per shift across 200+ volunteer hours, coordinating with clinical staff to streamline patient flow and ensure timely, accurate movement through key care checkpoints

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Bank of America

MAP Investment Banking Fellow

Remote

Dec 2025 – Present

- Selected as 1 of 50 NCAA athletes (10% acceptance) for a Bank of America–sponsored IB fellowship, completing 10+ assignments across accounting, valuation, and transaction analysis to build analyst-level readiness for real deal scenarios

Yale Varsity Cross Country and Track & Field

Division 1 Athlete

New Haven, CT

Sep 2024 – Present

- Balance 20+ weekly hours of NCAA training with rigorous academics and professional commitments, applying discipline, time management, and consistency to sustain high performance across athletic, academic, and career development demands

Yale Undergraduate Diversified Investments (YUDI)

Member

New Haven, CT

Sep 2024 – Present

- Conduct equity research and build financial models across multiple coverage names, analyzing industry trends and company fundamentals to support investment theses and contribute to team buy, hold, or sell recommendations

Yale Women in Economics

Events Committee Chair

New Haven, CT

Sep 2024 – Present

- Lead planning and execution of professional development events for a 290-member organization by coordinating speakers, logistics, and outreach to strengthen educational programming and expand student exposure to economics career pathways

Naperville North Varsity Cross Country & Track (Illinois 3A)

Team Captain & MVP

Naperville, CT

Sep 2020 – May 2024

- Led a 120-athlete program through training, meet preparation, and team initiatives, placing 3rd individually at state and guiding the team to a 5th-place finish to elevate program competitiveness and overall performance culture

SKILLS & INTERESTS

- *Skills:* Excel (financial modeling, DCF, LBO), Python, R, PowerPoint, Google Workspace, French
- *Interests:* Distance Running, Swimming, Baking, Travel, Piano

Katherine Metteauer

kmett@stanford.edu | Austin, TX | (512) 516-3185 | linkedin/katherine-metteauer

EDUCATION

Stanford University - Stanford, CA

Anticipated Graduation: **June 2028**

B.A. in Economics | **GPA:** 3.65/4.00

- **Relevant Courses:** Principles of Accounting, Probability and Statistics, Economic Analysis
- Wall Street Oasis: IB Crash Course, Excel Crash Course

EXPERIENCE

Stanford Athletes in Finance – Analyst | Stanford, CA

Sep 2025 – Present

- Developed technical and behavioral preparation materials for weekly meetings, strengthening understanding of IB and PE concepts.
- Learned foundational financial modeling topics through firm-led sessions, including valuation, M&A frameworks, and market analysis.
- Engaged with industry professionals to build insight into deal processes and career paths across the buy-side and sell-side.

Stanford Women in Finance – Member | Stanford, CA

Sep 2025 – Present

- Participated in interactive workshops on DCF analysis, LBO structures, and M&A mechanics.
- Collaborated with peers to practice technical interview questions and strengthen overall finance readiness.

Stanford Women's Lightweight Rowing – Coxswain | Stanford, CA

Sep 2024 – Present

- Led boat strategy and executed real-time race decisions under pressure, communicating pacing, positioning, and tactical adjustments with precision in high-stakes environments.
- Managed 20+ hours per week of dual AM/PM practices, balancing competing priorities while maintaining discipline, consistency, and operational focus across training and competition.
- Coordinated race-day logistics and directed athletes, ensuring flawless execution, clear communication, and seamless collaboration between athletes and coaching staff.

Free People – Retail Associate | Austin, TX

June 2025 – Present

- Executed daily sales operations and contributed to team revenue targets by engaging customers.
- Analyzed sales trends and identified opportunities to improve conversion rates and order value.
- Balanced work responsibilities alongside 50+ course credit hours and 20+ athletic hours weekly.

SPIbelt – Sales & Marketing Assistant | Austin, TX

Jan 2024 – Sep 2024

- Supported analytics and performance tracking for marketing campaigns, identifying trends to optimize future strategy.
- Managed outreach to 60+ creators, contributing to improved brand engagement and partnership depth.
- Organized brand presence at marathon expos, executing on-site customer engagement and assisting with sales growth.

SKILLS, INTERESTS, & ACHIEVEMENTS

Skills: Excel, Powerpoint, Financial Modeling, Communication, Leadership

Interests: Distance Running, Specialty Coffee, Interior Design

Honors: 5th-place individual finish at Eastern Sprints, 6th-place team finish at IRA National Championship, ACC Academic Honor Roll.

Katherine Wei

klwei@mit.edu | Lexington, MA | (781) 732-1998

EDUCATION

Massachusetts Institute of Technology (MIT)

Candidate for B.S. in Biological Engineering and Finance | GPA: 5.0/5.0

Cambridge, MA

Anticipated Graduation: June 2028

Activities: Global Platinum Securities (Investment Analyst), Sloan Business Club (Recruitment Chair), MIT Biotech Group (Undergraduate Associate), Camp Kesem, Women's Division I Lightweight Rowing, Kappa Alpha Theta (Deputy of Alumni Relations).

Noble & Greenough School

High School Diploma | GPA: 11.0/11.0 | SAT: 1590/1600 (EBRW: 790, Math: 800)

Dedham, MA

Aug. 2020 – June 2024

Activities: Science Olympiad (Founder, President), Varsity Rowing (Captain), Model UN/Debate (Captain), Mock Trial (Vice President), Red Cross Club (Vice President), Greensleeves A Cappella Group (President), Varsity Cross Country.

Honors/Awards: USA Biology Olympiad Semifinalist, National Merit Scholarship Recipient, Sheldon Prize for Excellence in Science, Trustees' Prize for Scholarship, AP Scholar with Distinction, Highest Academic Distinction, National Spanish Exam Gold.

PROFESSIONAL EXPERIENCE

Global Platinum Securities

Investment Analyst, Healthcare Sector

Cambridge, MA

Feb. 2025 – present

- Intercollegiate, student-run, long-only value investment fund with ~\$450k AUM. Collaborating with seven other partner universities.
- Selected as 1 of 4 MIT students in the class of 2028 to undergo a rigorous 6-month education program focused on business intuition, accounting, financial modeling, and securities analysis and selection.
- Pitching Crinetics Pharmaceuticals, Inc. (NASDAQ: CRNX) and Biohaven Ltd. (NYSE: BHVN).

MIT Laboratory for Financial Engineering

Undergraduate Researcher

Cambridge, MA

May 2025 – present

- Leading a case study of the Cancer Focus Fund by conducting literature review and interviewing key stakeholders and fund leadership.
- Synthesizing findings in academic paper under the direction of Dr. Andrew Lo.

Sloan Business Club

Executive Board Member, Recruitment Chair

Cambridge, MA

Sept. 2024 – present

- MIT's premier undergraduate business club. Gives members experience and education in finance, consulting, and entrepreneurship.
- Selected as 1 of 25 students to complete semester-long education program, now organizing events to recruit members for fall of 2025.

Make-A-Play Foundation

Morgan Stanley Skills Challenge Spring Fellow (Phase 1 & 2), Pro Bowl Games Fellow

Remote

Mar. 2025 – present

- Ranked in top 1% of competitive fellowship for college athletes. Led a team of 6 to create a \$2.5 million traditional retirement portfolio for a Morgan Stanley client, delivered recommendation to Fixed Income and Institutional Equities teams at Morgan Stanley.
- Selected as 1 of 40 athletes (top 3% of MAP Fellows) to compete in MAP's Pro Bowl Games, an investment banking tournament.

Hemann Laboratory at MIT Koch Institute for Integrative Cancer Research

Undergraduate Researcher

Cambridge, MA

Jan. 2025 – present

- Conducting assays to study mechanisms of antigen modulation in B-ALL during CAR-T cell treatment, and how interactions between target and effector cells contribute to treatment failure and cancer relapse.
- Using mouse models of hematological cancer to examine pathways of fratricide and exhaustion due to CAR-mediated trogocytosis.

LEADERSHIP AND ACTIVITIES

MIT Women's Lightweight Rowing

Varsity Rower

Cambridge, MA

Sept. 2024 – present

- Division I lightweight rowing team, competing as part of the Intercollegiate Rowing Association, ~25 hours/week fall, winter, spring.
- 3rd place at 2025 IRA National Championships, 1st place at National Open Collegiate Sculling Championships.

Noble & Greenough School Science Olympiad

Founder, President

Dedham, MA

Sept. 2020 – June 2024

- Founded Science Olympiad team, grew club by 40+ people and improved performance by 20+ places in MA state competition.
- Awarded 2nd place at MA state competition in Anatomy & Physiology, 2nd place at Harvard Invitational in Anatomy & Physiology.

Noble & Greenough School Model UN and Parliamentary Debate

Captain

Dedham, MA

Sept. 2020 – June 2024

- Led largest school club (~200 students), organized weekly meetings, moderated discussions and debates on politics and current affairs.
- Awarded at local and regional debates as well as local, regional, and international model UN conferences.

Noble & Greenough School Varsity Crew

Captain

Dedham, MA

Sept. 2020 – June 2024

- Captained largest sports team (roster capacity of 55), raced in 1st varsity boat, led team to win consecutive NEIRA championships.
- Awarded on local, regional, national (Youth Nationals), and international (Head of the Charles, Canadian Henley) levels.

SKILLS AND INTERESTS

- **Skills:** Mandarin (bilingual proficiency), Spanish (working proficiency), EMT-B, Python, Java, Microsoft Excel.
- **Interests:** Classical piano (12 years), hiking, folk pop, Grey's Anatomy, Cormac McCarthy books.

KILEY B. WILHELM

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EDUCATION

Harvard University – Cambridge, MA

GPA: 3.95/4.0

B.A. in Applied Math with a focus in Economics; German Language Citation

Graduation Year: 2028

- Accomplishments: Varsity Athlete, Harvard Women's Swimming & Diving; Ranked #2 nationally in recruiting class
 - Relevant Courses: Corporate Finance
-

PROFESSIONAL EXPERIENCE

MAP x Guggenheim Securities – "Diamond League" Investments Fellow | Remote

10/2025 – Present

- Selected as a **Diamond League Captain** (top 1% of 250+ MAP athletes) to lead a 5-member team on a **Consumer & Retail (C&R)** investment-banking case with **Guggenheim Securities**.
- Built a **3-statement operating model** and **valuation football field** (public comps + precedents) to assess **WHOOP**, a premium wearable-technology company.
- Developed **TAM/SAM/SOM market sizing**, peer benchmarking, and a banker-style industry deck; reduced analysis turnaround ~25% through standardized templates.
- Synthesized findings into **client-ready presentation materials** outlining investment thesis, key risks & mitigants, and strategic growth levers within the evolving C&R landscape.

Harvard Business School – Undergraduate Research Assistant | Cambridge, MA

05/2025 – 09/2025

- Researched the effects of private equity on public markets and analyzed MBA program trends under Prof. Paul A. Gompers, contributing insights to ongoing faculty projects
- Managed and analyzed big data using AI, Stata, and Python to support empirical research projects
- Cleaned, merged, and transformed raw data from multiple sources to prepare for statistical analysis and visualization; presented findings to research team
- Maintained data integrity by documenting processes and organizing code for transparency and replicability
- Collaborated with professors and fellow researchers to adapt methodologies, address evolving project needs, and ensure alignment with research goals
- Demonstrated flexibility in shifting priorities, rapidly troubleshooting data issues, and delivering results under tight deadlines

Harvard Division of Continuing Education – Proctor for Harvard Summer School | Cambridge, MA

05/2025 – 08/2025

- Oversaw residential life for 40 undergraduate summer students, ensuring a safe, inclusive, and academically supportive environment
- Acted as liaison between students and university staff, addressing housing concerns, enforcing policies, and resolving conflicts with professionalism
- Organized community events to promote engagement and build a supportive residential life for students
- Responded to student issues during assigned on-call shifts, including late-night concerns and emergencies, with discretion and care

Roman Catholic Diocese of Charlotte – Summer Intern for Properties and Risk | Charlotte, NC

05/2024 – 08/2024

- Updated insurance ledgers for over 100 properties, identifying previously undocumented land holdings and expanding the diocese's recognized property portfolio
 - Ran GIS reports to outline property boundary maps for each asset and coordinated with parishes to review coverage needs and resolve discrepancies
 - Audited expense reports for tax reimbursements in compliance with 501(c)(3) regulations
-

LEADERSHIP & COMMUNITY DEVELOPMENT

Harvard Swimming and Diving – Varsity Athlete | Cambridge, MA

08/2024 – Present

- Commit 25+ hours per week to training, competition, and team activities while balancing academic course load
- 2025 Ivy League Championship finalist

Harvard Financial Analysts Club – Member (Training Program) | Cambridge, MA

08/2025 – Present

- Attend weekly lectures and workshops focused on financial modeling, markets, and career development

Project Swim – Volunteer | Cambridge, MA

09/2024 – Present

- Assist children and adolescents with various disabilities in receiving water therapy on a weekly basis

German Swimming Federation – Member of German National Team | Berlin, Germany

11/2023 – 11/2024

- National Record Holder in Junior (17-18) 100 SCM Backstroke; 2023 National Champion in 100 and 200 SCM Backstroke
 - Competed at European Championships and German Nationals
-

ADDITIONAL SKILLS

- Skills/Programs: Microsoft Excel, GIS Applications, Python, and Stata
- Interests: Opera, Travel, and Food

Lauren C. Yu

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EDUCATION

University of North Carolina at Chapel Hill – Chapel Hill, NC | *Kenan-Flagler Business School*

Bachelor of Science, Business Administration | Minor in Statistics and Analytics

Awards: Dean's List, All-ACC Academic Team, ACC Academic Honor Roll, Tar Heel Scholar-Athlete

Relevant Coursework: Wall Street Prep: Accounting & Financial Statement Analysis Certification

Expected Graduation: May 2028

Cumulative GPA: 3.90/4.0

PROFESSIONAL EXPERIENCE

UNC Mergers & Acquisitions Group

Analyst

Chapel Hill, NC

Sep 2025 – Present

- Produce weekly sell-side M&A proposals for strategic and financial buyers as part of a ~5-member TMT sector team, supporting investment committee discussions across multiple acquisition scenarios and buyer outreach strategies under tight turnaround timelines and senior review
- Build financial models evaluating valuation, buyer selection, offer pricing, synergies, and transaction structuring, analyzing 3–5 potential acquirers per mandate to compare relative value, strategic fit, and execution feasibility under multiple deal scenarios and assumptions used in diligence
- Deliver ~5 slide pitch decks to investment committees summarizing valuation outcomes, market positioning, and acquisition rationale, demonstrating professional communication and judgment in a real-time, evaluative setting with senior-level scrutiny and feedback loops under decision pressure

Guggenheim Securities

MAP Investment Banking Fellow

Remote

Sep 2025 – Dec 2025

Selected Transaction Experience

- WHOOP — ~\$2.0B Implied Enterprise Value (Consumer Tech / Digital Health Acquisition Simulation)
 - Led planning and monitoring workflows for a live Consumer & Retail M&A case on WHOOP, coordinating analysis across market trends, valuation assumptions, and risk framing, earning Top Performer recognition from Guggenheim analysts [Andrew Pruss](#) and [Nathan Herrera](#)
 - Collaborated with 4 student analysts to structure and deliver a 15-slide client-ready deck, presenting live recommendations to Guggenheim Consumer & Retail bankers and earning Top Performer recognition for professional communication, clarity of thought, and judgment
 - Built integrated financial statements and valuation analyses including DCF, public comparables, and precedent transactions, stress-testing key revenue and margin assumptions to project ~5-year revenue growth and support an implied enterprise value of approximately ~\$2.0B
 - Identified and quantified 3 key transaction risks—execution, inflationary pressure, and competitive disruption—by stress-testing assumptions, estimating a 10–15% downside impact and informing mitigation considerations for investment decision-making under realistic scenarios

Merewether Investment Management

Investment Analyst

Dallas, TX

May 2025 - Aug 2025

- Performed fundamental research on a major AI cloud infrastructure provider, synthesizing industry dynamics, business model drivers, and financial performance into a 25+ slide investment report presented for internal investment review supporting capital allocation decisions
- Constructed valuation analyses including a discounted cash flow model and public comparables, supporting an investment thesis through scenario-based assumptions and sensitivity analysis across growth and margin outcomes under varying macro conditions
- Managed and executed options strategies for a \$15,000 portfolio in collaboration with the Head Credit Portfolio Manager, demonstrating risk management, trade execution discipline, and professional communication in a live investment setting with real capital at risk

Columbia University Department of Art History

Media Center Data Analytics Intern

New York, NY

Sep 2023 – June 2024

- Digitized and categorized 2,500+ works across art, architecture, and archaeology collections, applying structured data organization and quality-control standards to support accuracy and usability for academic research and publication workflows within a large-scale archival system
- Curated and optimized 50+ archival documents through alignment, retouching, and color correction, improving visual consistency and data integrity
- Redesigned the department website using UX/UI testing and Figma, streamlining content navigation and layout to enhance accessibility and engagement for 1,900+ active users while improving usability, information clarity, and cross-page consistency across core content sections

LEADERSHIP & EXTRACURRICULARS

UNC Division I Fencing Team

Varsity Athlete

Chapel Hill, NC

Aug 2024 – Present

- Balance 20+ hours per week of training, travel, competition, and sports psychology alongside a full academic course load under high expectations
- Compete as a foil starter across 10 collegiate meets, including the ACC Fencing Championships and NCAA Regionals against top-ranked programs
- Maintain a national USA Fencing ranking while earning All-Academic and All-American First Team honors across multiple competitive seasons

Richard A. Baddour Carolina Leadership Academy

Student Mentor & Member

Chapel Hill, NC

Aug 2024 – Present

- Mentor 6–8 first-year student-athletes through Carolina NAVIGATE, focusing on communication, teamwork & goal setting during transition periods
- Facilitate 6 leadership workshops engaging 200+ students, modeling accountability, professionalism & student-leader values across campus programs
- Collaborate with 80+ student-athletes across teams to apply leadership principles to academic and athletic performance in competitive environments

PISTE: Fencing in the Park

Assistant Coach

New York, NY

Jul 2022 – Present

- Lead fencing instruction and mentor 80+ youth from under-served Brooklyn communities, emphasizing discipline, confidence, and skill development
- Coach alongside 2× Olympian Nzingha Prescod & other Olympic, World, and NCAA athletes, modeling elite standards, professionalism + leadership

Children's Cardiomyopathy Foundation

Volunteer Marketing Intern

Tenafly, NJ

Jan 2019 – Present

- Develop marketing materials for a national patient advocacy organization focused on chronic pediatric heart conditions, supporting outreach and education initiatives; design visual content for 16 educational and awareness campaigns across webinars, website, and social media platforms

SKILLS & INTERESTS

Technical Skills: Python, Tableau, R, MATLAB, Adobe Suite, Google Suite, Figma, Visual Studio Code

Professional Programs: Citibank D1 Development, Bank of America Externship, Bloomberg Market Concepts Certification

Interests: Fencing, graphic design, traditional art, cooking, exploring new restaurants, tennis, pickleball, EDM/house music

LEIGH M. FORAN

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EDUCATION

Columbia University – New York City, New York

GPA: 3.9/4.0

B.A. in Financial Economics and Cognitive Science

Anticipated Graduation: May 2028

- **Accomplishments:** United States Presidential Scholar, Valedictorian of Staples High School, Dean's List Honoree, National Merit Scholarship
- **Relevant Courses:** Principles of Economics, Macroeconomics, Microeconomics, Calculus III, Statistical Reasoning

PROFESSIONAL EXPERIENCE

Zeus Global Capital – *Private Equity Analyst* | New York, New York

October 2025 – Present

- Supported the end-to-end investment process on lower middle-market buyout and growth-equity transactions (enterprise value \$10M–\$100M; revenue \$5M–\$75M) in software and technology-enabled services for a global private investment firm backed by family offices
- Conducted in-depth valuation and financial modeling to assess acquisition targets and support investment recommendations to senior partners
- Built investment theses across technology sub-verticals by analyzing market trends, competitive positioning, and recurring revenue profiles; presented findings influencing Zeus Global's investment pipeline

Mangusta Capital – *Venture Capital Intern* | New York, New York

April 2025 – August 2025

- Screened 150+ early-stage startups across consumer tech and AI, creating structured datasets of KPIs (revenue run-rate, churn, funding history, valuation) using Crunchbase, PitchBook, and company filings to benchmark scalability and market fit
- Developed a quantitative scoring framework to rank startups by growth rate, unit economics, and founder quality, enabling partners to focus diligence on the top 10–15% of high-priority opportunities
- Conducted due diligence and investor outreach for portfolio fundraising, identifying LPs across family offices, institutions, and angels, and preparing materials to articulate fund strategy and value proposition

Centre for Global Health Inequalities Research – *Quantitative Research Analyst* | Trondheim, Norway

April 2024 – March 2025

- Co-authored a 30-page systematic review and meta-analysis (27 studies, 11 countries) quantifying relationship between educational attainment and COVID-19 mortality, applying mixed-effects meta-regression
- Produced executive-level policy briefs and statistical reports for academic and government stakeholders, synthesizing findings on mortality disparities to inform international public health strategy as part of WHO Technical Advisory Group
- Collaborated with a 30+ member global research consortium (including institutions in the U.S., Europe, South America, Africa, and Asia), strengthening cross-cultural project management and advanced quantitative analysis skills

Yale University Center for Analytical Sciences – *Research & Analytics Intern* | New Haven, Connecticut

June 2023 – August 2024

- Led a 12-person research team analyzing large-scale datasets provided by 6 university research centers across the U.S., applying regression models, scenario analysis, and sensitivity testing
- Assessed treatment impact and variance between control and test groups, applying statistical risk assessment and return trade-off analysis
- Produced executive-level reports and presentations to Yale School of Public Health faculty and New Haven city officials, directly informing allocation of a \$3.4M community health grant from YSPH and shaping funding deployment decision

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Fellowship – *Investment Banking Fellow* | Remote

March 2025 – Present

- Selected as 1 of 40 student-athletes (top 3% of 1,200+ Make A Play Fellows) in a highly competitive fellowship for college athletes to compete in MAP's Pro Bowl Games, an elite gamified investment banking tournament with direct banker evaluations
- Showcased leadership, communication, and technical ability, completed 50+ hours of technical casework, mock interviews, and live competitions

Student Ambassadors for Columbia College Alumni – *Ambassador* | New York, New York

September 2024 – Present

- Selected through a competitive application and interview process to represent Columbia College students to alumni
- Plan and coordinate networking events, speaker panels, and alumni dinners for Columbia College Women (CCW) alumni network

NCAA Division 1 Cross Country and Track and Field – *Middle Distance Runner* | New York, New York

August 2024 – Present

- Dedicate 30+ hours per week to training, competitions, and team commitments while balancing academic responsibilities
- Compete in middle-distance events, demonstrating discipline, mental resilience, and strategic race execution
- Develop strong leadership, teamwork, and time management skills in a high-pressure, competitive environment
- Selected by coaches from a pool of 120+ teammates to represent team on the Columbia Student-Athlete Advisory Committee (SAAC), serving as Representative for Track and Field Team to foster open communication across all varsity sports

SKILLS & INTERESTS

- **Skills and Languages:** Statistical analysis using R, Microsoft Word, PowerPoint, literature review and academic writing, Spanish (Seal of Bilingualism)
- **Clubs:** Columbia Athletics Finance Society, Columbia Women's Business Society, Columbia University Global Ambassador Program
- **Interests:** New York Yankees, Artificial Intelligence, Soccer (2x Connecticut State Champion), Matcha, PopUp Bagels, Recreational Tennis

Leo Salvucci

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EDUCATION

Carnegie Mellon University, Tepper School of Business - GPA: 3.9/4.0

Pittsburgh, PA

Major: Economics

Expected Graduation: May 2028

Relevant Coursework: Accounting, Microeconomics, Macroeconomics, Calculus, Statistics

WORK EXPERIENCE

Serval Ventures - Venture Capital Summer Analyst | New York, NY

May 2025 - Present

- Conducting comprehensive market research to inform strategic decisions for portfolio companies, identifying viable customer targets likely to purchase the product based on demonstrated need and strategic fit.
- Reviewing pitch decks and supporting diligence for early-stage investments and a new debt fund, delivering targeted recommendations to the managing director on companies with strong investment potential.

Vettd.ai - Business Strategy Intern | Bellevue, WA

May 2025 - Present

- Leading initial market research and competitive landscape analysis to identify industry trends, assess competitors, and uncover opportunities that shaped the go-to-market plan and supported valuation for Vettd.ai's new product.
- Working with Vettd.ai's CEO to align product strategy with user feedback and market trends for institutional adoption.

Caprae Capital Partners - Private Equity Intern | Glendale, CA

Feb 2025 - Jun 2025

- Generated 40+ acquisition targets weekly for search fund clients using defined financial and strategic benchmarks, delivering 250+ viable targets recommended for client pursuit.
- Initiated strategic outreach to C-suite executives, sparking interest in potential acquisition and partnership opportunities aligned with the firm's investment strategy.

LEADERSHIP AND PROFESSIONAL DEVELOPMENT

MAP x Vista Equity Partners - "Victory Formation" Fellow (Phase 1 & 2) | Ewing, NJ

Jun 2025 - Present

- Phase 1: Selected to participate in a national mock interview competition for high-achieving college athletes, ranking in the top 1% of all fellows & ultimately qualifying for Phase 2 of the fellowship as team captain based on strong performance in Phase 1 (90%+).
- Phase 2: Led a deal team of 3 other college athletes to identify a new software company that aligns with Vista's investment strategy, creating detailed financial statements while also recommending a series of value creation strategies.

Carnegie Mellon Men's Varsity Soccer Team - Midfielder | Pittsburgh, PA

Aug 2024 - Present

- Managing a 25+ hour weekly commitment on Carnegie Mellon's varsity men's soccer team while excelling academically through consistent discipline and focus in a high-performance, time-constrained environment.
- Selected as one of 7 players to serve on the team's leadership group, guiding culture and decision-making in a competitive NCAA environment.

Financial Analyst Student Training - Club Member | Pittsburgh, PA

Sep 2024 - Present

- Underwent a summer program providing exposure to stock pitches, case studies, and technical finance concepts through structured training sessions and peer collaboration.
- Teamed up with peers to analyze real-world case studies and develop experience discussing market trends and investment theses.

Goldman Sachs - Virtual Insight Series | New York, NY

May 2025 - Jun 2025

- Participated in Goldman Sachs' four-week Virtual Insight Series, an interactive digital program designed to deepen understanding of the firm's culture, career development approach, and business divisions.
- Networked with professionals across multiple business divisions, enhancing understanding of the financial industry.

Tepper Undergraduate Real Estate Club - General Board Member | Pittsburgh, PA

Sep 2024 - May 2025

- Engaged in professional development opportunities to build a practical and comprehensive understanding of real estate finance and investment strategies.
- Collaborated with peers and heard from industry professionals to expand knowledge and establish valuable connections within the real estate sector.

SKILLS, INTERESTS, & LANGUAGES

Skills: Excel, Apollo, Time Management, Leadership, Teamwork

Languages: English - Fluent, Spanish - Beginner Proficiency

Interests: Soccer, Spikeball, Golfing, Scrabble, Camping, Traveling, Food

LIZZIE G. HELLER

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EDUCATION

Georgetown University – Washington, D.C.

GPA: 3.80/4.0

B.A. in Economics | Minor in Business Administration | Graduation Year: 2028

- Accomplishments: Deans List
- Relevant Courses: Economic Statistics, Calculus I, Fundamentals of Finance, Micro/Macroeconomics, Computational Business Modeling, Econometrics

PROFESSIONAL EXPERIENCE

Boys & Girls Clubs of America – *Intern* | Atlanta, GA

06/2025 – 08/2025

- Collaborated with Finance and Legal teams to streamline project workflows for national youth programs, improving reporting efficiency and supporting initiatives that served over 3.6 million members
- Analyzed and synthesized complex legal and financial documents into standardized templates for use of over 5,000 clubs

Athletes to Athletes – *Mentor*

07/2025 – Present

- Lead recurring virtual one-on-one coaching sessions with youth soccer player, providing structured guidance on athletic development, academic balance, and performance mindset
- Facilitate individualized goal-setting frameworks and teach resilience, discipline, and time management strategies, fostering long-term personal and athletic growth; Serve as a consistent role model, building a high-trust mentorship relationship

LEADERSHIP & COMMUNITY DEVELOPMENT

Division 1 Athlete

08/2024 – Present

- Women's Soccer Team: Manage 16-credit course load with 25+ hours of training
- 2025: Second Team All-Big East, Big East Regular Season Championship, NCAA Tournament 2-Seed, TopDrawerSoccer Team of the Week, Big East Weekly Honor Roll, NCAA DI Women's Soccer Oversight Committee Nominee
- 2024: Freshman All-America Second Team, Third Team All-Big East, Big East All-Tournament Team, Big East Regular Season Championship, NCAA Tournament Participant, ranked 19th in the Top 100 Freshman

MAP x UBS – Asset Management Fellow

12/2025 – Present

- Selected as 1 of 30 NCAA athletes nationwide for a 10-week asset management fellowship sponsored by UBS
- Expected to design a \$250M Global Sports Real Asset Portfolio, allocating capital across stadiums, mixed-use fan districts, university housing, and training facilities
- Scheduled to deliver a committee-style portfolio pitch to UBS leaders on Monday, March 23, presenting asset selection rationale, implementation pacing, and projected IRR vs benchmark

Athletes Invest – *Analyst*

09/2025 – Present

- Help manage fund of \$10,000 in a first-of-its-kind student-athlete investment club; selected for analyst role among 90+ applicants through two rounds of interviews
- Attend two financial education sessions a week, focused on accounting, investor acumen, and valuation techniques
- Collaborate with teammates across various varsity sports to evaluate financial data, identify market trends, and present insights to inform strategic investment decisions in final stock pitch (Consumer & Retail Group)
- Built an investment thesis on Dollar Tree (DLTR), analyzing revenue drivers, Family Dollar divestiture, and dynamic pricing models to develop a buy recommendation supported by DCF, comps, and turnaround catalysts

Student-Athlete Advisory Committee (SAAC) – *Official Team Rep.*

08/2025 – Present

- Serve as liaison between Georgetown Women's Soccer and athletic administration, voicing team concerns and contributing to community engagement, and student-athlete initiatives
- Currently coordinating a Georgetown "Hilltop Holiday Dash" 5k fundraiser event, managing logistics and outreach

ADDITIONAL SKILLS

- Skills and Language(s): Excel, PowerPoint, Generative AI Prompt (ChatGPT), Writing, Spanish (proficient)
- Service: Volunteer Soccer Camp Counselor (Atlanta), So Others May Eat (D.C.), Georgetown University Christian Athletes, Christ the King Catholic Church Parishioner (Atlanta)
- Interests: Ping Pong, Fashion, Marathons, Talking with Mouth Closed, Chocolate/PB Combos

Madison A. Brogan

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EDUCATION

Columbia University, New York, NY

Bachelor of Arts Degree, Financial Economics

9/24-Present (5/28 graduation)

- GPA: 3.95/4.0

The Lawrenceville School, Lawrenceville, NJ

- GPA: 3.9 GPA; Graduated with High Honors

9/20-5/24

- Competitive college preparatory school; member of Eight Schools Association and Schools Admission Organization.

RELEVANT EXPERIENCE

Columbia University Lionsbridge: Financial Services Bootcamp, New York, NY

Fellow

1/25-Present

- Selected to join program led by Columbia alumni who are industry leaders in finance.
- Gained knowledge of accounting, finance, and valuation through lectures, group exercises, and individual financial modeling exercises.
- Conducted in-depth research and financial analysis of Walmart, including evaluating financial statements, performing discounted cash flow (DCF) analysis, and gathering financial data for comparable companies to assess market position and investment potential.
- Receive on-going personalized mentorship from industry experts and participate in monthly lectures to sharpen financial services career readiness.

Life Time Athletics, Princeton, NJ

Camp Counselor

6/24-8/24

- Led coed children, ages 4-13, in age-appropriate swim, soccer, basketball, and arts and crafts activities.

Ultimate Lacrosse Club, Princeton, NJ

Lacrosse Coach

5/24-7/24

- Taught 20 14-year-old females in lacrosse basics; supervised assistant in running daily drills; coached team in competitive youth lacrosse tournaments.

LEADERSHIP AND COMMUNITY INVOLVEMENT

Columbia University Women's Lacrosse, NCAA Division 1, New York, NY

Team member

9/24-Present

- Dedicate 25 hours per week to practice, competition, and team meetings.

Columbia University Kappa Alpha Theta Sorority, New York, NY

Member

1/25-Present

- Raises funds to support programs and items for children for Court Appointed Special, a group that helps approximately 280,000 abused or neglected children find safe and permanent homes each year.
- Attends weekly chapter meetings to coordinate sorority initiatives, plan social and philanthropic events, and manage chapter operations.

Lawrenceville Varsity Lacrosse and Soccer, Lawrenceville, NJ

Team member

9/20-5/24

Lightning Lacrosse Youth Recreational Organization, West Windsor, NJ

Volunteer Coach

2/22-4/23

- Taught coed youths, Grades 1-4, fundamental lacrosse skills on weekly basis.
- Organized and supervised games with neighboring townships.
- Coordinated fundraising events, raising \$1500 of lacrosse equipment donated to underprivileged children.

NON-TECHNICAL SKILLS AND INTERESTS

- Skills: Collaborative, Workflow Priorities, Deadline Management
- Interests: Reading, Financial Markets, Political Science

Madeleine G. Cole

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EDUCATION

Columbia University – New York, NY

Bachelor of Arts, Financial Economics | Minor in Arabic | ACT: 36

Accomplishments: Dean's List: Fall 2024, Spring 2025, Varsity Athlete (Women's D1 Rowing)

Relevant Coursework: Wall Street Oasis Investment Banking Prep Course, Pivotal180; Columbia University: Accounting and Finance, Intermediate Microeconomics, Intermediate Macroeconomics, Arabic I, Principles of Economics, Calculus-Based Statistics, Multivariable Calculus, Islam, Frontiers of Science, Literature Humanities, Contemporary Civilizations, University Writing, Wall Street Prep: Accounting & Financial Statement Analysis Certification

Expected Graduation: May 2028

Cumulative GPA: 3.94/4.0

PROFESSIONAL EXPERIENCE

Farallon Capital Management

Incoming Summer 2026 Investments Intern

San Francisco, CA

June 2026 – Aug 2026

- Joining a buy-side team focused on fundamental, catalyst-driven public-equity research across multiple sectors. Expected to build detailed financial models, perform scenario and sensitivity analyses, and evaluate valuation/comparable frameworks to support position initiation and monitoring
- Expected to conduct deep-dive company and industry research, track catalysts and earnings revisions, and synthesize insights into investment memos to support weekly discussions with senior analysts and portfolio managers within a fast-paced research environment and live markets

Guggenheim Securities

MAP Investment Banking Fellow

Remote

Sep 2025 – Dec 2025

Selected Transaction Experience

- EcoEnclose — ~\$30M+ *Implied Enterprise Value (Sustainable Packaging / Consumer & Retail Acquisition Simulation)*
 - Selected as 1 of 6 Captains from 78 athletes (~8%) to lead the Initiation Phase of a live Guggenheim C&R M&A case, framing the acquisition rationale, strategic logic, and market thesis for **EcoEnclose** in a \$448B sustainable packaging sector growing 2–3× with ecommerce demand
 - Analyzed 3–4 secular drivers (including CR/EPR regulation, EU Green Claims enforcement, and recycled-input scarcity) quantifying ecommerce packaging growth and ESG-driven capital flows (51% of packaging M&A), producing the final market-context slide delivered live
 - Developed EcoEnclose's Company Overview—product mix, customer reach, PCR inputs, and margin trajectory—integrating valuation signals from public comps and precedents into a cohesive Initiation brief; recognized as Top Performer by analysts [Grace Gozdecki](#) & [Payton Ahola](#)

Point72 Academy

Team Captain

New York, NY

Oct 2025 – Nov 2025

- Guided a 4-person analyst team as Captain in the Point72 Academy Case Competition, building a full DCF, public comps set, and investment pitch under a one-week turnaround, producing decision-ready outputs that strengthened thesis conviction and elevated team scoring in final evaluation
- Directed valuation and research on Monday.com (NASDAQ: MNDY), integrating U.S. (10-K/10-Q) and international (20-F) filings, benchmarking revenue growth and margin trajectories, and synthesizing findings into a cohesive investment thesis with quantified upside/downside scenarios

Harry Technologies

Summer Intern

New York, NY

Jun 2025 – Aug 2025

- Drove a comprehensive Excel-based competitor analysis evaluating pricing architecture, feature depth, UX workflows, and market positioning across 10+ SaaS platforms, presenting quantified insights to senior leaders that shaped prioritization & redirected focus toward highest-ROI enhancements
- Delivered recommendations with a >60% implementation rate, contributing to feature rollouts adopted across Harri's global platform and measurably improving performance, usability, and adoption for 65,000+ client locations worldwide through competitive benchmarking
- Collaborated across U.S. and Middle East time zones with product, engineering, and operations managers, executing multi-layer data validation and region-specific accuracy checks to ensure market compliance and enhance reliability of international product configurations, strengthening quality

Useful Fiction LLC

Growth Strategy Intern

Remote

Oct 2024 – Jul 2025

- Orchestrated multi-platform growth campaigns targeting defense and emerging-tech clients by analyzing segmented audience data, optimizing narrative framing, and refining outreach strategy to raise engagement rates by 40%+ and strengthen top-of-funnel pipeline quality
- Built 20+ executive-ready PowerPoint decks synthesizing campaign performance, competitive positioning, and whitespace analysis, delivering quantified insights that shaped quarterly strategic planning and redirected leadership focus toward highest-leverage growth initiatives

EXTRACURRICULARS

Columbia University Women's Rowing

Division 1 Varsity Student-Athlete

New York, NY

Aug 2024 – Present

- Compete as a Division I rower while balancing 40+ hours per week of training, travel, and team commitments with a 3.94 GPA, developing advanced time-management, communication, and teamwork skills that strengthen performance both in competition and in the classroom

Alexander Hamilton Society

Active Member

New York, NY

Aug 2024 – Present

- Participate actively in Alexander Hamilton Society sessions by analyzing U.S. foreign-policy strategy, great-power competition, and global security challenges, synthesizing expert insights into structured policy positions that strengthen analytical rigor and geopolitical judgment

Tufts University

Pre-College Student: International Relations and Arabic

Medford, MA

Jul 2023 – Aug 2023

- Completed Tufts University's intensive Pre-College program in International Relations and Arabic, earning semester-equivalent academic credit and passing highly selective entrance exams, ranking in the top percentile of applicants to demonstrate advanced readiness and discipline

Tufts University

Pre-College Student: International Relations and Arabic

Medford, MA

Jul 2022 – Jul 2023

- Selected from 1,000+ applicants for Johns Hopkins CTY's competitive Behavioral Mathematics institute, studying probability, statistics, combinatorics, and strategic decision-making models through university-level coursework to apply analytical frameworks to real-world problems

SKILLS & INTERESTS

Skills and Language(s): English (Fluent), French (Fluent), Arabic (Conversational), Norwegian (Conversational)

Programs: Microsoft Office Suite (Excel, PowerPoint, Word), Google Workspace, R Studio, Windows, Atlassian

Marley P. Altarac

[LinkedIn Profile](#) • (516) 675-2366 • marley.altarac@emory.edu

EDUCATION

Emory University – Atlanta, GA

Bachelor of Arts in Business Administration and Psychology (Double Major) | ACT: 35

Expected Graduation: June 2028

Cumulative GPA: 3.96/4.0

- **Awards/Accomplishments:** Student-Athlete (Women's Soccer), UAA All-Academic Team
 - **Relevant Coursework:** Accounting, Data & Decision Analytics, Business Economics, Corporate Finance
-

PROFESSIONAL EXPERIENCE

Oliver Wyman

MAP Strategy Consulting Fellow

Remote

January 2026 – Present

- Selected from NCAA athletes nationwide (~15% acceptance) for a 10-week strategy fellowship sponsored by Oliver Wyman, completing modules on workflow redesign, capacity modeling, and operational diagnostics to build strategy and consulting readiness
- Expected to deliver 10+ weekly analyses diagnosing patient-flow bottlenecks and evaluating tech-enabled modern healthcare solutions, integrating 5+ rounds of evaluator feedback to strengthen MECE structuring, synthesis depth, and executive-style communication

Clothes On

Campus Representative

Remote

July 2025 – Present

- Network with 10+ university clubs and organizations each cycle to expand brand presence, identifying partnership opportunities and generating new sales pipelines through targeted outreach and relationship-building that supports sustained revenue growth
- Manage 5+ client accounts end-to-end by guiding design and ordering workflows, resolving 3–5 issues per cycle, and maintaining clear communication to ensure accurate fulfillment and consistent client satisfaction that drives repeat engagement

Finale Inventory

Head Counselor (Seasonal)

Wyandanch, NY

June 2023 – August 2025

- Led daily programming for 30+ campers—including children battling cancer, in remission, and their siblings—while coordinating 8 co-counselors to create an inclusive, structured environment that built confidence, stability, and emotional well-being across sessions
 - Resolved 5–8 weekly conflicts by mediating disagreements, reinforcing behavioral expectations, and encouraging supportive peer interactions, strengthening group cohesion and improving overall camper experience across high-needs summer cohorts
-

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

Emory University Varsity Soccer

NCAA Division III Student-Athlete

Atlanta, GA

August 2024 – Present

- Dedicate 12+ hours weekly to training, film study, strength work, and recovery while balancing full academic responsibilities, applying discipline and structured time management to maintain strong performance across athletic, academic, and leadership commitments
- Serve on the injury support committee by checking in with 8–10 recovering teammates weekly, reinforcing motivation and accountability during rehabilitation to strengthen team culture, cohesion, and long-term athlete well-being

Goizueta Investment Management Group

Equity Fund Analyst

Atlanta, GA

February 2025 – Present

- Manage \$350K+ of Emory's endowment by conducting fundamental research, evaluating industry trends, and assessing risk-adjusted return profiles to support investment recommendations grounded in long-term portfolio strategy and disciplined equity analysis
- Collaborate weekly in equity fund meetings to discuss macro themes, integrate headwinds, tailwinds, risks, and mitigants into valuation perspectives, and refine pitch materials for Huntington Ingalls Industries and additional coverage names

Emory BPM

VP of Communications

Atlanta, GA

February 2025 – Present

- Direct a 6-member communications team to research and secure music industry professionals for biweekly events, strengthening member access to career insights and expanding the organization's network across Atlanta's entertainment landscape
- Prepare club-wide messaging for 60+ students, coordinating event promotion and cross-platform communication to maintain high engagement, improve turnout consistency, and reinforce visibility of professional development initiatives

Delta Delta Delta Sorority

Director of Lifetime Membership

Atlanta, GA

February 2025 – Present

- Organize 3-5 sisterhood events per semester and develop senior engagement initiatives that strengthen chapter cohesion, recognize member contributions, and build sustained participation across the organization's 100+ person membership base

Shooting Stars Soccer

Volunteer Coach

Plainview, NY

August 2023 – June 2024

- Conducted weekly sessions for 20+ children with disabilities by designing inclusive drills and adaptive training plans that built confidence, improved technical skills, and promoted a supportive environment for diverse ability levels, earning trust in the process
-

ADDITIONAL SKILLS

- **Skills & Language(s):** Spanish (Intermediate), Microsoft Office Suite (Basic), Google Workspace, Canva (Basic)
- **Other Activities:** Alpha Kappa Psi, Goizueta Women in Finance (Undergrad Rep), MEOR Business Fellowship
- **Interests:** Country Music (Tyler Childers, Chris Stapleton), Hockey (NY Rangers), Travel (Portugal, Hawaii)

MARYAM A. MIAN

cwc3he@virginia.edu | 609.608.5577 | [LINKEDIN](#)

EDUCATION

University of Virginia – Charlottesville, VA Graduation Year: 2028
McIntire School of Commerce – Bachelor's in Commerce GPA: 3.86/4.00

- Accomplishments: Dean's List, MASC All-Academic Team
- Relevant Coursework: Foundations of Commerce, Principles of Microeconomics and Macroeconomics, Calculus, Foundations of Financial Accounting, Foundations of Finance

The Lawrenceville School – Lawrenceville, New Jersey Graduation Year: 2024
High School Diploma | *Cum Laude*

- Accomplishments: High Honors, Jan Baker Female Scholar Athlete Nominee, Varsity Squash Captain

PROFESSIONAL EXPERIENCE

Giant Leap Capital – *Intern* | New York, New York **06/2025- Present**

- Researched and presented high-conviction investment themes, funding trends, and market leaders.
- Evaluated the role of artificial intelligence in private equity, identifying sourcing, diligence, and operational use cases to recommend strategic applications for firm adoption.
- Developed public market investment theses through a growth equity lens, benchmarking scalability, capital efficiency, and profitability to build actionable investment cases.

Valuation Research Company – *Intern* | Yardley, Pennsylvania **08/2024- 08/2024**

- Gained valuable exposure to finance fundamentals, including financial statement analysis, valuation and capital market
- Completed several DCF models, developing significant efficiencies in Excel and financial statement analysis
- Engaged in multiple professional development seminars and networking opportunities, strengthening internal relationships and developing insight into careers within finance

Squash Tigers – *Coach* | Princeton, New Jersey **04/2024- Present**

- Coached and supervised 30-40 children ages 6-15 in full-day summer camp activities
- Provided individualized technical training and strategic guidance during 5-10 student rotations, developing significant leadership acumen improving ability to identify strategic growth areas and refining project implementation abilities

LEADERSHIP AND ACTIVITIES

Make A Play Foundation (MAP) – *Undergraduate Fellow* | Remote **11/2024- Present**

- Chosen for a 2-part fellowship preparing high-achieving college athletes for careers at top firms
- Selected as 1 of 40 (from 1,200+ fellows, top 3%) for MAP's gamified investment banking tournament.
- Completed 50+ hours of technical prep, casework, and interview simulations mirroring Superday intensity.
- Appointed Scrum Master, leading 1-2 sprint meetings weekly and coordinating 5+ workstreams to deliver 100% of project deadlines on time.

UVA Varsity Squash Team – *Team Member (4th Position)* | Charlottesville, Virginia **08/2024- Present**

- Committing 10-15 hours a week off-season and 15-20 hours in-season for training and competition
- Competing in intercollegiate squash matches nationwide
- Playing as the 4th seed on a roster of 14 players for the 6th-ranked women's squash team in the U.S.

Delta Sigma Pi Professional Business Fraternity – *Exec Team Member* | Charlottesville, Virginia **02/2025- Present**

- Serve as DEI Chair on the Executive Team, leading workshops and supporting professional events
- Contributed 10+ hours to recruitment and interview process, assisting in selection of new members

Kirby House Prefect – *Prefect* | Lawrenceville, New Jersey **08/2023- 05/2024**

- Supervised 40 underclassmen, developing significant leadership experience ability to manage competing work streams
- Met with campus leadership regularly, including student council to align house activities with school-wide initiatives

ADDITIONAL PROFICIENCIES AND INTERESTS

- Skills and Language(s): Microsoft Office Suite (Excel, Power Point, Word), Spanish
- Interests: Long Distance Running, Oil Paintings, Volunteering, Mystery Books, Hiking and Travelling

Megan Doyle

Boston, MA | 781 - 901 - 5093 | megan.doyle@yale.edu | www.linkedin.com/in/megandoyle28

EDUCATION

- Yale University**, New Haven, CT **GPA: 3.78/4.0**
Bachelor of Arts Degree in Economics Expected Graduation May 2028
- **Relevant Coursework:** Intermediate Microeconomics, Intro. Macroeconomics, Intro. Microeconomics, Portuguese (Level 1-3), Intro. Statistics and Programming (R), Game Theory
 - **Accomplishments:** 2025 Ivy League Champions in Women's Lacrosse
- Weymouth High School**, Weymouth, MA **Weighted GPA: 4.787**
- **Accomplishments:** Ranked 2/419 students, Key to the City for Academic and Athletic Success, Two-sport Varsity Captain, National Honor Society, South Shore Female Athlete of the Year, 2025 Doug Flutie Award

WORK EXPERIENCE

- Make A Play Foundation**, Wealth Management Fellowship **September 2025**
- Selected as 1 of 100 college athletes to participate in a fellowship to prepare athletes for professional success.
 - Received 20+ hours of interview preparation, professional development coaching & industry-specific training for competitive roles.
 - Selected as one of 20 Fellows (top ~10% of 200+) in MAP's Legacy Bowl, contributing to a 5-member team developing MS's Parametric Custom Core Strategy projected to engage 500+ high-net-worth athletes and entertainers by 2026.
 - Manage 20+ deliverables during my phase of the project, taking ownership of timelines and quality control to ensure 100% on-time submission and client-ready standards.
- Goldman Sachs Internal Audit Job Simulation**, Forage **June 2025**
- Completed a job simulation for Internal Audit at Goldman Sachs.
 - Conducted comprehensive audits and risk assessments within the Global Banking and Markets division, developed and recommended control improvements and compliance strategies, demonstrating the practical application of auditing principles.
- Citi Investment Banking Job Simulation**, Forage **June 2025**
- Completed a job simulation where acting as a buy-side analyst for a hypothetical client, Big Box Retail, who were looking to acquire a small retail company.
 - Created a company profile for the target, developed a five-year financial projection using a simple income statement model in Excel, drafted a comparative company analysis, synthesized an investor update into an internal summary report.
- Yale Lacrosse Camps**, Coach **August 2024-Present**
- Led campus tours and a Q&A panel for student-athletes and families, providing insights into the college experience and athletic recruitment process.
 - Motivated high school athletes during scrimmages and drill sessions, fostering teamwork, discipline, and competitive performance.
- Star's Restaurant EatWell**, Waitress **May 2025-Present**
- Handled multichannel revenue-generating interactions (online orders, phone reservations, in-person seating) to optimize seating turnover during peak hours, improving operational throughput.
 - Designed digital and physical menu layouts using Canva under tight deadlines to reduce order errors and clarify pricing / item descriptions, improving guest satisfaction.

LEADERSHIP & ACTIVITIES

- Yale University Women's Varsity Lacrosse** **Present**
- Dedicated 40+ hours per week to daily team practices, off-field training, games, travel, lift, and team meetings while balancing a rigorous academic schedule.
- Yale Undergraduate Diversified Investments Club** **Present**
- Participated in weekly meetings for Yale's largest undergraduate finance organization, gaining an understanding of relevant concepts of the finance industry and recruiting process that may not be comprehensively covered in Yale's liberal arts program.
- Smart Women Securities Club** **Present**
- Attended weekly meetings to collaborate with a diverse group of women to promote financial literacy and empower members through lessons, seminars, and networking events.
 - Applied knowledge gained throughout seminar series to analyze industry trends and news while developing detailed reports and presentations with stock recommendations for the SWS portfolio.
- FOCUS Orientation Leader**, Yale **August 2025**
- Guided incoming freshmen through local community service and introductory activities, creating lasting relationships.
 - Mentored a group of 10 First Years throughout a week of bonding activities, providing advice about school culture and academics.
- A Shot For Life**, South Shore MA **January 2023**
- Selected as a top lacrosse player in the region to raise \$1000 for cancer research, played in a cumulative All-Star game.

SKILLS & INTERESTS

Skills: Excel Proficient, R Proficient, Wall Street Prep Certification in the Three Financial Statements, Teamwork, Time Management

Interests: Baking, Card Games, Running, Triathlons, Travel, Photography

Molly Evans

8828 Burning Tree Road, Bethesda, MD 20817 | mre58@georgetown.edu | (202) 733-0044

EDUCATION

Georgetown University, McDonough School of Business Washington, DC

B.S. in Business Administration, Majors: Finance and Accounting, GPA: 3.84/4.00 *Expected May 2028*

- Relevant Coursework: Financial Accounting, Microeconomics, Macroeconomics, Statistics, Calculus
- Honors/Awards: First Honors; Dean's List; ITA Division I Scholar Athlete; Georgetown Student Athletic Advisory Council, *VP Internal Operations*; Make-A-Play Foundation, *Fellow*

Sidwell Friends School Washington, DC

High School Diploma; GPA: 3.81/4.00 *June 2024*

- Activities: Women's Tennis, *Captain*; Debate Club, *Member*; Sustainable Fashion Club, *Member*
- Awards: Universal Tennis Ranking, *Team Ranked 2nd Nationally*; DCSAA Women's Tennis, *State Champion*

WORK EXPERIENCE

Abundant Venture Partners Chicago, IL

Venture Fund Intern *June 2025 - August 2025*

- Abundant is a venture capital fund with \$130M AUM, directing \$80B in healthcare provider buying power
- Wrote investment memo for a Prescribed Pediatric Extended Care company: reviewed information memorandum, conducted due diligence, and valued company using public comparables and DCF analysis
- Created an excel KPI dashboard for Auxira, a portfolio company focused on cardiovascular telehealth
- Attended 30 company pitches, drafted meeting notes, and collected and summarized team's initial views
- Screened 200 companies to identify potential candidates based on industry, size, fundraising, and customer

Cinnamon Hill Partners Chicago, IL

Search Fund Intern *December 2024 - February 2025*

- Assisted with due diligence on a Prescribed Pediatric Extended Care (PPEC) business: reviewed CIM, performed competitive analysis, drafted deal teaser for LP investors
- Wrote industry report on PPEC, including market analysis, secondary research, and interviews with experts

MedStar Georgetown University Hospital Washington, DC

Intern *June 2024 - August 2024*

- Designed and executed experiment to assess ChatGPT accuracy evaluating wound images and care relative to hospital surgeons; authored research paper summarizing findings and submitted to industry journal for review

EXTRACURRICULARS

Georgetown University Division I Women's Tennis Washington, DC

Varsity Member *September 2024 - Present*

- Competed in biweekly intercollegiate matches and attended daily practices (25 hours/week)
- Assisted team to 6-0 Fall 2024 and 4-1 Fall 2025 records

Georgetown Athletes Invest Washington, DC

Vice President - Healthcare *February 2025 - Present*

- Co-led investment process in healthcare sector for student-run investment fund with ~\$75k AUM
- Drafted and presented stock pitches and discussed market updates and industry trends
- Led recruiting initiatives, including candidate interviews and coffee chats, to expand the analyst team

Georgetown University Business and Healthcare Association Washington, DC

Analyst - Investment Department *October 2025 - Present*

- Conducted market research and company analysis across biotech, devices, and services and presented to peers
- Attended educational workshops, career panels, and networking events with alumni

ADDITIONAL SKILLS AND INTERESTS

Community: Georgetown Finance Society, *Junior Officer*; Morgan's Message, *Georgetown Ambassador*; Athlete-to-Athlete, *Mentor*; Grassroots Health, *Volunteer*; Wider Circle, *Volunteer*

Interests: Tennis, Electronic Dance Music, Cooking, Surfing, National Parks

NATHANAEL ABRIALS

1407 Russell Road, Alexandria, VA 22301 | (703)-362-7479 | nta3124@columbia.edu

EDUCATION

Columbia University, Columbia College — B.A. Sustainable Development, GPA: 3.8/4.00

New York, NY | Expected May 2028 | Dean's List

Gonzaga College High School — GPA: 4.4/4.00

Washington, D.C. | National Honors Society; 1st Academic Honors

EXPERIENCE

Finance & Accounting Intern — Avocado Green Brands

Fullerton, CA | Jul – Aug 2024

- **Created competitive analyses, variance reports, and trend visualizations** to support monthly financial reporting, improving executive decision-making.
- **Built recurring financial dashboards in Domo** to monitor vendor spend, sales performance, and KPIs, enabling leadership to identify cost-saving opportunities.
- **Reconciled company credit card expenses** and optimized the NetSuite Fixed Assets Module by cleaning and centralizing data, strengthening internal controls, and ensuring reporting accuracy.

Retail Sales Associate — Avocado Green Brands

New York, NY | Jun 2024 – Present

Advised customers in-store and online on product features, certifications, and sustainability initiatives, generating **\$75K+ in sales** and developing client-facing communication skills.

ATHLETICS & LEADERSHIP

Columbia University Men's Varsity Heavyweight Rowing Team

New York, NY | Aug 2024 – Present

Balanced **35+ hours** of weekly training with academics as an NCAA Division I student-athlete.

United States Rowing National Team

Chula Vista, CA | Summers 2022, 2023

Trained at the U.S. Olympic Training Center; earned 1st Place in Men's 8+ and 4+ at CanAmMex Regatta..

SUPPLEMENTAL COURSEWORK

- ESG Risks & Opportunities, The Wharton School, Univ. of Pennsylvania — Jan 2025
- ESG Impact: Investor Perspective, The Wharton School, Univ. of Pennsylvania — Jan 2025

SKILLS

- **Financial Systems:** Oracle NetSuite (Fixed Assets, GL, Reporting), Ramp Expense Management
- **Analytics & Modeling:** Excel (financial modeling, pivots, variance analysis), Domo (dashboards, KPIs)
- **Languages:** Japanese (Beginner/Conversational), Latin (Proficient), Spanish (Reading/Basic Conversational)

NICHOLAS FRANK

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EDUCATION

WASHINGTON UNIVERSITY, OLIN BUSINESS SCHOOL | St. Louis, MO **August 2024 – May 2028**

Bachelor of Science in Business Administration – Finance and Computer Science Double Major

- GPA: 3.93/4.0, Dean's List (all semesters)

PEMBROKE HILL SCHOOL | Kansas City, MO **August 2020 – May 2024**

High School Diploma

- Unweighted GPA: 97.06/100 | ACT: 36/36 | National Merit Finalist, AP Scholar with Distinction, Summa Cum Laude
- *Activities:* Trading Club President, Model United Nations President, Varsity Swim Captain, AIME Qualifier, Peer Tutor

PROFESSIONAL EXPERIENCE

GREAT RANGE CAPITAL | Kansas City, KS **May 2026 – August 2026**

Incoming Private Equity Analyst

- Will be responsible for sourcing investment opportunities and conducting financial modeling for prospective acquisitions

HEALIUM | Columbia, MO **July 2025 – August 2025**

Enterprise Sales Associate

- Restructured ICPs by applying market research strategies, improving outreach success and sale conversion rates by 10%
- Expanded CRM utilization by creating automated workflows and templates, establishing scalable sales infrastructure
- Redesigned comprehensive materials, transforming complex enterprise use cases into clear, actionable value propositions

MAP x VISTA EQUITY PARTNERS – “Victory Formation” | Remote **June 2025 – August 2025**

Investments Fellow

- Participated in a highly selective national mock interview competition for high-achieving college athletes, ranking in the top 5% of all Fellows & ultimately qualifying for Phase 2 of the fellowship based on strong performance in Phase 1 (90%+)
- Collaborated with a deal team of 3 other college athletes to identify a new software company that aligns with Vista's investment strategy, creating detailed financial statements while also recommending a series of value creation strategies
- Pitched *PayHaven*, a VC backed payment processor and ERP, to Oliver Wyman Executives in a series of presentations

LEADERSHIP & ACTIVITIES

WASHINGTON UNIVERSITY VARSITY SWIM TEAM | St. Louis, MO **August 2024 – Present**

NCAA Student-Athlete

- Invest 20+ hours a week through swim practices, dryland, weightlifting, physical therapy, and team meetings
- Orchestrate team study-hours, improving the men's team GPA to 3.83 average, the highest of any NCAA swim team
- Qualified for and selected to UAA Championship team racing against top Division III programs
- Assist coaching staff in coordinating recruit campus visits and programming to secure high-performing athletes

ARCH CONSULTING | St. Louis, MO **August 2024 – Present**

Team Member

- Compete in international case competitions in teams of 3-4, collaborating on empiric-backed solutions to technical problems
- Placed 3rd in division at University Van Amsterdam competition for our unique hub-and-spoke Irish expansion for Amazon
- Focus on innovative, realistic, and efficient solutions within time constraints that enhance market positioning in the long term
- Lead financial modeling and market sizing through educated assumptions and industry competitors

WASHINGTON UNIVERSITY INVESTMENT BANKING ASSOCIATION | St. Louis, MO **September 2025 – Present**

Active Member

- Participate in weekly meetings to learn skills pertinent to investment banking recruiting and internship processes
- Learn about the investment banking industry, including analyst responsibilities, deal dynamics, and broader market strategies

WASHINGTON UNIVERSITY CONSULT YOUR COMMUNITY | St. Louis, MO **August 2024 – Present**

Consultant

- Provide strategic pro bono consulting focusing on rebranding initiatives to enhance market positioning and brand identity
- Generate tailored recommendations to refine messaging and target new customer segments, improving revenue and retention

MISSOURI VALLEY ATHLETE REPRESENTATIVE | Kansas City, MO **May 2020 – May 2024**

Representative, Summit Attendee

- Selected as 1 of 15 athlete leaders to represent and advocate for 4,000+ Missouri Valley swimmers, voting on key legislation
- Consulted on policies for Safe Sport (sexual assault prevention), DEI initiatives, and financial aid while attending USA Swimming's 3-day leadership seminar in Chicago to strengthen athlete relations and LSC reputation

SKILLS & INTERESTS

- Memberships & Affiliations: Beta Theta Pi, Make A Play Foundation
- Skills: Coding (Java, Python, C), Spanish (Conversational), Public Speaking
- Interests: Backpacking, Motorcycles, Civil Engineering, FPV Drones, Cooking, Formula 1, Spikeball

Nicole P. Granovsky

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EDUCATION

University of Michigan at Ann Arbor | Ross School of Business

Bachelor of Arts, Business Administration

Ann Arbor, MI

Expected Graduation: May 2028

- **GPA:** 3.70/4.0 | **SAT:** 1470 (Math – 790)
- **Accomplishments:** NCAA D1 Student-Athlete (UMichigan Rowing), Guggenheim FOCUS Program, Citi D1 Athlete Development Program
- **Relevant Coursework:** Accounting 300, Technical Operations 301, Business Administration 100, Business Administration 200, Wall Street Prep: Accounting & Financial Statement Analysis Certification

PROFESSIONAL EXPERIENCE

TAMID at Michigan (Michigan's Premier Consulting & Investment Club)

Investment Analyst

Ann Arbor, MI

Sep 2024 – Present

- Led an 8-member consulting team advising Tastewise, an AI-driven food-tech startup, by evaluating scalability of an unlimited-user SaaS model through benchmarking, client interviews, and market sizing, developing tiered pricing frameworks to optimize enterprise ARR growth and valuation
- Developed and pitched an investment thesis on Mercado Libre (NASDAQ: MELI), analyzing Latin American B2C e-commerce growth (~20% CAGR), 15% YoY user expansion, and entry into 5 new markets, persuading the investment committee to add MELI to TAMID's portfolio

Guggenheim Securities

FOCUS Program Participant

Remote

Dec 2025 – Present

- Selected to participate in Guggenheim Securities' Sophomore FOCUS Program, engaging in intensive information sessions, educational panels, and networking discussions designed to develop investment banking acumen, accounting fundamentals, and professional judgment within context of IB
- Paired with a full-time Guggenheim banker mentor and completed structured programming emphasizing ownership, attention to detail, and communication, earning a guaranteed in-person interview for the 2027 Summer Analyst Program through demonstrated performance

SideShift

Growth Analyst

Remote

Oct 2024 – Present

- Onboarded and managed new business partners by negotiating flexible trial offers and promoting subscription models, serving as primary point of contact in bi-weekly check-ins to strengthen relationships and drive higher retention and conversion outcomes across 10+ active partners
- Expanded platform user base from 10K to 50K in under three months by launching targeted outreach campaigns, connecting 40K+ college students with flexible part-time roles aligned to academic schedules through SideShift's job-matching platform across multiple campus markets

Guggenheim Securities

MAP Investment Banking Fellow

Remote

Sep 2025 – Dec 2025

Selected Transaction Experience

- The RealReal (NASDAQ: REAL) — ~\$1.2B Implied Enterprise Value (Luxury Resale / Consumer & Retail Investment Thesis Simulation)
 - Owned the Control Phase by pressure-testing the investment thesis for **The RealReal**, articulating 3 data-backed reasons to buy—[1] category growth (~14% resale CAGR), [2] authentication-driven AOV uplift (~15–20%) & [3] operating leverage inflection—to rate IC-level conviction
 - Constructed the “why now” urgency case by linking near-term catalysts including physical retail expansion, improving gross margin trajectory, and normalized demand post-inventory reset, framing timing-sensitive upside critical to sponsor underwriting decisions across 3 key catalysts
 - Re-validated valuation outputs by independently re-testing EV/Revenue and EV/EBITDA ranges against updated public-peer and precedent benchmark; confirmed defensibility of a ~\$1.2B target enterprise value and identified downside floor under conservative multiple compression

Citi

D1 Athlete Development Program Intern

Remote

May 2025 – Aug 2025

- Selected as 1/20 sophomores (200+ applicant pool) for a Division I athlete development program, completing finance-focused training modules, analyst-led workshops, and mock interviews across investment banking and risk management to refine résumé, personal pitch, and mentor network

LEADERSHIP & EXTRACURRICULARS

University of Michigan Women's Rowing Team

Varsity Athlete

Ann Arbor, MI

Aug 2024 – Present

- Commit 40+ hours per week to Division I training, competition, and travel while managing a rigorous academic course load
- Contribute to the team's 3rd-place finish at the 2025 Big Ten Championships through consistent training, race strategy, and execution
- Demonstrate inclusive and transparent leadership that empowers teammates and supports performance development on and off the water

Banking at Michigan

Analyst

Ann Arbor, MI

Sep 2025 – Present

- Selected from a pool of 250+ applicants for a competitive analyst role emphasizing technical rigor and professional development
- Complete intensive education sessions & applied assignments to strengthen understanding of financial modeling/valuation/global business practices
- Apply operating model development, DCF & LBO analysis through an extensive case study, refining advanced Excel proficiency/valuation judgment

Michigan Short Term Trading

Media Sector Head

Ann Arbor, MI

Sep 2024 – Present

- Lead sector coverage and pitch development as Media Sector Head, analyzing Viking Therapeutics (NASDAQ: VKTX) by evaluating pipeline catalysts including VK2809 Phase 2 NASH data and VK5211 weight-loss trial outcomes to assess risk-adjusted upside and timing
- Stress-tested execution, margin, and macro risk scenarios by quantifying downside impacts to revenue growth and EBITDA inflection, isolating key sensitivities that informed final deal-rationale slides and mitigated over-reliance on base-case assumptions across multiple cases
- Conduct industry comparables, financial modeling, and risk analysis, securing investment committee approval for portfolio allocation

SKILLS & INTERESTS

Skills & Languages: Bloomberg Certified, Excel, PowerPoint, Word | Fluent in **English, Spanish, Russian**

Interests: Avid card player (always have a deck on hand), Shark Tank (2x Local Champion), Baking, Home Alone Fanatic, Learn a new trick monthly - now working on my walking handstand, Financial Literacy (Invest in Girls graduate)

Peter Alexander Chang

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<https://www.linkedin.com/in/peter-chang-columbia/>

Permanent Address: 1249 Via Romero, Palos Verdes Estates, CA 90274

EDUCATION

Columbia University, Columbia College | Expected Graduation: May, 2028

New York, NY

- Bachelor of Arts Major in Financial Economics, GPA: 3.8/4.0
- Dean's List, 4.0 Varsity Student Athlete
- NCAA Division 1 Varsity Athlete
- Columbia Quant Group, Member; Columbia Athletics Finance Society, Member

Additional Courses/Certifications

- CFA Investment Foundations, Bloomberg Market Concepts, Wall Street Prep (DCF Modeling, Financial Statement Modeling, Accounting)

PROFESSIONAL EXPERIENCE

Columbia University Lionsbridge: Financial Services

New York, NY

Lionsbridge Fellow

January 2025 - Present

- Selected to join a prestigious program led by Columbia alumni who are industry leaders in finance.
- Developed proficiency in accounting, finance, and valuation through lectures, group exercises, and individual financial modeling exercises.
- Receive on-going personalized mentorship from industry experts and participate in monthly lectures to sharpen financial services and career readiness.

Sidebench

Santa Monica, CA

Product Development Intern

June 2025 - August 2025

- Designed and implemented an AI-powered automation system to generate and publish weekly LinkedIn and blog content, maintaining consistent brand presence across platforms with an audience of 5,000+.
- Developed end-to-end workflows integrating AI tools with content management, reducing content delivery timelines by 60%.
- Collaborated with marketing and product teams to align AI-generated content with brand tone, improving engagement by 20%.

RizqX

New York, NY

Investment Analyst Intern

January 2025 - May 2025

- Evaluated Shariah-compliant investment products across asset classes (ETFs, sukuk, REITs, private equity) to assess suitability for platform inclusion, analyzing fund structures, performance metrics, and compliance standards using Excel and proprietary analytical tools.
- Authored 10+ investment memoranda on funds including IGFREF Fund, MSCI ETFs, EQ8 SEA Islamic Dividend ETF, and HSBC Global Funds ICAV, providing performance analysis and strategic recommendations that informed client advisory strategy and product development decisions.
- Conducted comparative analysis of fund performance drivers and risk-return profiles, identifying optimization opportunities across a portfolio of Shariah-compliant investment vehicles.

Game Changers Corporation

Los Angeles, CA

Founder, President

January 2020 - Present

- Founded and scaled 501(c)(3) nonprofit serving 1,500+ youth athletes across Kenya and Uganda, directing all fundraising, partnership development, and operational logistics to deliver soccer programming and equipment at no cost to participants.
- Raised \$50,000 in cash donations and secured \$125,000+ in donated equipment (5,000+ jerseys, 1,000+ shorts, 150 cleats, 100 balls) through corporate partnerships and individual donor cultivation.
- Organized annual youth tournament involving 15+ teams and oversaw construction of soccer field at Nairobi orphanage, expanding access to athletic facilities for 200+ children.

EXTRACURRICULAR

Columbia University NCAA Division I Varsity Men's Soccer

New York, NY

Midfielder

August 2024 - Present

- Balance 30+ hours of weekly athletic commitments with rigorous academic coursework, maintaining 3.84 GPA and Dean's List recognition while competing at Division I level.
- Develop leadership, teamwork, and performance-under-pressure capabilities through high-stakes Ivy League competition.

AIG & Freeman Foundation

USA, Japan

Program Diplomat

June 2022 - August 2022

- One of 20 Americans chosen to represent the United States for a summer of cultural exchange and learning experience with Japanese students.
- Served as group leader, facilitating discussion on educational, environmental, political, and social issues.

SKILLS AND INTERESTS

Skills: Financial Modeling, Investment Analysis, AI Automation, Workflow Engineering, Microsoft Office Suite (incl. Excel & PowerPoint)

Interests: Sports Memorabilia Collecting/Selling, Sneaker Collecting/Reselling, Watch Collecting, Travel

Phillip (Phil) Head

pghead@emory.edu • (678) 428-4119 • [LinkedIn](#)

EDUCATION

Emory University, Goizueta Business School

Bachelor of Business Administration, Finance | Double Major: Economics

Cumulative GPA: 3.85/4.00

Relevant Courses: Accounting, Data Analytics, Business Economics, Macroeconomics

Atlanta, GA

May 2028

WORK EXPERIENCE

Phil's Financials - Emory University Hatchery | Founder & CEO | Atlanta, GA

Apr. 2025 — Present

- Designing an AI-driven gamified finance platform for low-income high schoolers, boosting retention and insights
- Establishing a pipeline of 35+ professionals, interns, and professors to provide soft-skill and industry-specific insights
- Developing interactive modules, including market recaps, headline summaries, and exposure to careers in finance

SmartThink Marketing Group | CRM Specialist Intern | Washington, D.C.

May 2025 — Aug. 2025

- Consolidated 30+ client records into Zoho One CRM, streamlining data management and boosting team efficiency
- Automated 15+ weekly reporting tasks and over three deals through Zoho workflows reducing manual errors
- Integrated new CRM across two departments, contributing to \$300,000+ in successful deals and lead conversions

Multimerica Media - MultiTV | Product Development Intern | Austin, TX (Remote)

May 2025 — Aug. 2025

- Analyzed 15+ business models and revenue strategies to enhance MultiTV+ growth and streamline monetization
- Directed platform strategy through survey of 300+ consumers, extracting insights shaping content priorities
- Leveraged an AI-powered software to develop new user interface enhancing usability and driving engagement

LEADERSHIP & COMMUNITY INVOLVEMENT

Goizueta Investment Management Group | VP of Community Involvement

Jan. 2025 — Present

- Oversee over \$400,000 of GIMG's student-managed fund and allocate portions toward financial literacy projects
- Cooperate with seven other members to deliberate and execute Metro ATL community involvement initiatives
- Engage with underrepresented demographics in local high schools through mentorship programs and stock pitches

Wall Street Club - BLK Capital Management | Fellowship

Jun. 2025 — Present

- Collaborate weekly with 35+ nationwide fellows and five Roark Capital professionals, mastering IB/PE concepts
- Complete five case studies applying valuation, M&A, and debt financing methods to assess investment decisions
- Deliver research and portfolio insights to financial professionals during a NYC and Chicago trek program experience

Make a Play Foundation | Morgan Stanley Legacy Bowl

Aug. 2025 — Present

- Selected as 1 of 20 Fellows (top ~10%), developing MS's Parametric Custom Core Strategy for HNW athletes
- Analyzed risks, benefits, and demand for \$250K-minum product tied to sports leagues, refining their market fit
- Built tailored wealth plans for athletes and entertainers, aligning recommendations with fiduciary standards

Emory Scholars of Finance | VP of Finance & Operations

Jun. 2025 — Present

- Direct chapter finances, managing budgets, reimbursements, and resource allocation for over 50 active members
- Facilitate 7+ annual speaker events, engaging 300+ students while advancing impactful financial literacy initiatives
- Implement streamlined budgeting processes, enhancing transparency and strengthening chapter sustainability

Goizueta Black Student Association | VP of Programming

Aug. 2024 — Present

- Organize 10+ annual events, engaging diverse audiences and enhancing community programming outreach
- Develop cultural programming initiatives, fostering leadership growth and impacting 50+ undergraduates yearly
- Strengthen campus collaboration by partnering GBSA with over six student organizations to expand its impact

ADDITIONAL INFORMATION

Additional Activities: Emory Men's Varsity Soccer, SEO Career Program, Alpha Kappa Psi, Jack and Jill Incorporated

Honors & Awards: NAACP Athlete of the Year Nominee Honoree, The National Black MBA Scholarship Recipient

Skills: MS Office (Intermediate), Spanish (Novice), Canvas, Lovable.dev, Bloomberg Market Concepts

Interests: Acoustic Guitar, Crocs, Golf, LeBron/MJ Debate, NBA (Hawks), Soccer (Manchester United), Thrifting

Raghav Gopalakrishnan

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EDUCATION

Wharton School, University of Pennsylvania – Philadelphia, PA **GPA: 3.96/4.0**

B.S. in Economics | *Concentration:* Finance | ACT: 35 | SAT: 1550 | Graduation Year: 2028

- **Accomplishments:** National Merit Scholar, AP Scholar, High School Cross Country All-American
- **Relevant Courses:** Competitive Strategy, Introduction to Computer Programming (Python), Introductory Business Statistics, Introductory Economics for Business Students
- **Online Coursework:** Fundamentals of Finance, Fundamentals of Quantitative Modeling, Introduction to Spreadsheets and Models

PROFESSIONAL EXPERIENCE

Charlotte Running Company – *Sales Associate* | Charlotte, NC *Sep 2023 – Aug 2024*

- Worked as a sales associate for specialized running shoes at Charlotte Running Company
- Used gait analysis, personalized fitting, communication skills, and an understanding of 100+ running and walking shoes to serve customers in the Charlotte Area
- Generated over \$30,000 in sales alone from 100+ customers for the South Charlotte/Promenade location

Macquarie Bank – *Intern* | Remote *Mar 2025*

- Mentored by an experienced commodities trader to analyze commodity markets, options strategies, and market-making
- Learned about the components of a trading model, correlated commodity movements with equities, and built trade-war options scenarios for LNG and crude oil.
- Developed a technical trading model using python and regression analysis to incorporate fundamentals as well as underlying movements using a moving average system

IESE Business School – *Research Assistant* | Madrid, Spain *May 2025 – Aug 2025*

- Researched drivers of Spanish-International M&A under the guidance of Prof. Marta Elivra and Prof. Africa Ariño
- Used python and cosine similarity to help quantify governance and ownership structure in driving equity vs. contractual mergers and joint ventures
- Analyzed 300+ financial reports, shareholder disclosures, and governance philosophies to complete a research dataset

EXTRACURRICULARS

NCAA D1 Cross Country, Track & Field – *Student-Athlete* | Philadelphia, PA *Jul 2024 – Present*

- Student-Athlete on the Varsity Cross Country and Track Teams at the University of Pennsylvania
- Regularly contributing for the team through training 50+ miles a week, strength training, and competing at the collegiate level in addition to school and club work
- Qualified to compete in the 5000m at the 2025 Ivy League Outdoor Track Heptagonal Championships at Yale

Wharton Investment and Trading Group – *Investment Analyst* | Philadelphia, PA *Sep 2024 – Present*

- One of 8 out of 100+ freshman selected to join the Special Situations Investing Committee
- Developing an understanding of industry analysis, competitive advantages/moats, drivers, stock pitching, modeling, and investment strategies
- Created 4 stock pitches and wrote multiple industry analyses and investment theses

Wharton Undergraduate Distressed Investing Group – *Credit Investment Analyst* | Philadelphia, PA *Jan 2025 – Present*

- One of ~10 freshman in WUDIG learning about restructuring and distress, and credit investing
- Studying a variety of relevant cases and developing optimal response and investment strategies for distressed companies
- Analyzed a recent deal involving liability management exercises and produced a written analysis and presentation

ADDITIONAL SKILLS

- **Technical Skills:** Python, Quantitative Modeling using Excel, Microsoft PowerPoint
- **Languages:** English, Tamil, Hindi, Spanish
- **Interests:** Have played clarinet in Carnatic and Western styles for 9 years, and currently a member of a band, Penn Sargam

Reagan Exley

Reagan.Exley@gmail.com | 703-408-6629
linkedin.com/in/reaganexley/

EDUCATION

Yale University | New Haven, CT

Bachelor of Arts

Major: Economics

May 2028

GPA: 3.93

ACT: 36

EXTRACURRICULAR ACTIVITIES

Yale Varsity Women's Soccer | NCAA Division I Athlete

- Demonstrates the ability to manage 30-40 hour training commitments per week including both team and individual workouts, practices, and games while maintaining strong academic performance.

The Aeris Club

- Engages in community service and advocacy through The Aeris Club, promoting women's empowerment and supporting underserved populations in the greater New Haven area.

WORK EXPERIENCE

South Block | Arlington, VA

May 2023 – August 2024

Blockstar

- Worked fifteen hours weekly during high school and full time during the summers while maintaining a rigorous course load and extensive extracurricular commitments.
- Delivered exceptional customer service in a high-volume environment; recognized with an award for excellence.
- Managed full store open and close procedures, including cash handling and daily reporting.
- Supported new employee onboarding and trained team members across operational roles.

Starbucks | Arlington, VA

May 2022 – August 2022

Barista

- Worked thirty hours weekly with a fast-paced team to manage high-volume operations during peak hours, ensuring service efficiency and accuracy under pressure.
- Delivered exceptional customer experiences through proactive service, adaptability, and strong interpersonal communication.
- Trusted with store open/close responsibilities, including register reconciliation and inventory checks, reflecting reliability and attention to detail.

Next Chapter Essays | Great Falls, VA

May 2021 – August 2025

Founder

- Founded Next Chapter Essays, a college admissions consulting service focused on helping students develop authentic, standout personal statements.
- Marketed the business through social media, school networks, and referrals, building a steady and diverse client base.
- Helped students craft, edit, and perfect their college admissions essays, resulting in acceptances to top universities, including Brown, Georgetown, Georgia Tech, Notre Dame, Syracuse, Vanderbilt, and UVA.

OTHER INTERESTS

- Working proficiency in American Sign Language (ASL); passionate about advocating for and working with the Deaf community.
- Deep interest in Game Theory, particularly its applications in strategic decision-making, negotiation, and competitive environments.

Reagan D. Jamison

rjamison@wharton.upenn.edu | 360-844-9477 | Philadelphia, PA | linkedin.com/in/reagan-jamison

EDUCATION

University of Pennsylvania, The Wharton School

B.S. in Economics, Concentration in Finance

Philadelphia, PA

Expected May 2028

- **Cumulative GPA:** 3.75
- **Varsity Women's Basketball (Division 1):** Commitment of 30+ hours/week while balancing a full academic load
- **Relevant Coursework:** Corporate Finance, Microeconomics, Macroeconomics

Camas High School, Camas, Washington

- **Unweighted GPA:** 3.95

WORK EXPERIENCE

SilverShore Partners

Partner

Philadelphia, PA

June 2025 – Present

- Onboarded and managed four private equity clients, including a multibillion-dollar fund, expanding SilverShore's investor network and proprietary deal flow
- Conducted discovery calls with managing partners to evaluate investment criteria and sourcing gaps across manufacturing, distribution, and business services
- Built and executed automated outreach campaigns using PitchBook and Apollo to identify founder-led, lower-middle-market acquisition targets

BizSphere

Acquisitions Associate

Remote

April 2025 – July 2025

- Sourced and evaluated tech-enabled acquisition targets for ETA operators and family offices through BizSphere's AI-powered M&A platform
- Performed market research and preliminary due diligence, analyzed growth potential, risks, and strategic fit across software and SaaS businesses

CHANGE Global Investment

Research Analyst

Camas, Washington

September 2022 – July 2024

- Provided research in the developing world and the background of companies that are listed on the emerging and frontier markets
- Assessed market conditions, geopolitical risks, and financial performance to support investment decisions

EXTRACURRICULAR ACTIVITIES

University of Pennsylvania Varsity Women's Basketball

Guard/Forward

Philadelphia, PA

August 2024 – Present

- Competing at the Division I Ivy League level while balancing 30+ hours per week of training, travel, and competition with a full Wharton course load
- Cultivate leadership, discipline, and resilience by performing under high-pressure environments and contributing to team success

Make A Play Foundation

Winter Formula 1 Fellow

Philadelphia, PA

September 2024 – April 2025

- Selected for a competitive fellowship for high-achieving college athletes; completed 10+ hours of interview prep and received feedback from Fortune 500 HR professionals
- Collaborated with a deal team advising a PE firm on healthcare acquisition; built balance sheet and financial forecasts using Wall Street Prep training

Special Olympics Unified Basketball

Coach/Mentor

Camas, WA

November 2023 – March 2024

- Coached and mentored Unified Basketball Athletes through the Special Olympics Program, fostering inclusion among athletes with intellectual disabilities.
- Led practices and regional competitions, emphasizing teamwork, sportsmanship, and building confidence

ADDITIONAL SKILLS AND INTERESTS

- **Skills:** Microsoft Excel, PowerPoint, Word, Market Research, Apollo, Financial Modeling (basic), CRM/Outreach Tools
- **Interests:** Sports, Cooking, Travel, Music, Movies, Yoga, Skiing

RECE L. BAKER

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EDUCATION

University of Chicago – Chicago, Illinois

B.A. in Business Economics & Public Policy | Minor in Race, Diaspora and Indigeneity | SAT: 1320

GPA: 3.55/4.0

Graduation Year: 2028

PROFESSIONAL EXPERIENCE

YMCA– Lifeguard | Lansing, MI

January 2024 – May 2024

- Supervised patrons in the water, ensuring safety and adherence to rules. Along with instructing children ages 5-13 in water safety techniques.
- Guarding patrons, teaching, and overseeing swim lessons for children learning to swim. Operating over 2 pools one for lap swim and splash pad.
- Successfully passing each kid into the next level of training to be safe swimmers. Making sure that all patrons are safe and enjoying their swim.

Country Club of Lansing – Lifeguard | Lansing, MI

May 2024 – August 2024

- Managed pool deck operations and supervised water activities for patrons. Taught water safety and swim lessons to children ages 3-16.
- Cleaned and replenished resources for pool deck while admitting patrons. Taught swim lesson at different levels based on child's ability.
- Successfully passing each kid into the next level of training to be competitive swimmers. Making sure that all patrons are safe and enjoying their swim.

Dewitt High School – Assistant Strength & Conditioning Coach | Dewitt, MI

May 2024 – August 2024

- Trained over 200 children ages 10-16 on improving speed and strength. Teaching them lessons like leadership, teamwork, and discipline.
- Improved lifting form, introduced to exercises, and developed sports specific movements. Created challenges to test team building skills.
- Prepare young kids for the next level in their athletic careers while developing life skill for on and off the field.

University of Chicago – Lifeguard | Chicago, IL

May 2024 – August 2024

- Safeguard patrons, enforce safety rules, and provide emergency response services. Stand-by first response for Ratner Athletic Center.
- Guarding patrons in competition swim & dive pool with over 20 lanes. Rotates and organizes with at least other guard.
- Making sure that all patrons are safe and enjoying their swim. Keeping pool deck safe and keeping other safe in the athletic center.

LEADERSHIP & COMMUNITY DEVELOPMENT

MAP x Sixth Street – “Pick Six” Alternative Investments Fellow (Phase 1 & 2) | Remote

January 2025 – Present

- **Phase 1:** Selected to participate in an exclusive 3-week interview preparation bootcamp for high-achieving college athletes, competing against 200+ others in 3 mock interviews sponsored by Sixth Street, achieving a score of 90%+ in all 3 interviews and earning a top spot on MAP's Leaderboard
- **Phase 2:** Qualified for Phase 2 of the fellowship based on strong performance in Phase 1 (90% or above), collaborating with a team of 6 to recommend a new premier women's soccer club to Sixth Street leadership; efforts include conducting in-depth deal analysis, sourcing opportunities, and developing a value-add strategy to ensure the potential acquisition aligns with the Sixth Street's growth-oriented investment strategy

University of Chicago Varsity Football– Team Member | Chicago, IL

August 2024 – Present

- Playing Division 3 varsity football at a top 10 university in the nation.
- Managing rigorous academic responsibilities alongside rigorous athletic commitments maintaining a high level of achievement.
- Compete for a conference championship while developing time management and leadership skills.

Dewitt High School Varsity Athlete– Captain/Team Member | Dewitt, MI

June 2021 – November 2023

- 3-Sport athlete in high school playing football, basketball, and baseball while achieving multiple accolades.
- 4 years of Varsity Football, 2x Captain, 2x Academic All-State, Region, and Conference; 2 years of Varsity Baseball, 1 year of JV, 2x Academic All-State, Region, and Conference; 2 years of JV Basketball with injuries for the varsity seasons.
- Built leadership, teamwork, and time management skills while playing sports I loved build lifelong principles.

Dewitt Middle School – Mentor | Dewitt, MI

August 2023 – May 2024

- Mentored middle school students, addressing academic and social challenge. Spent similar time with other students in their sport.
- Worked with students in the classroom supporting their needs in solo of group settings. Coached 7th/8th grade football and basketball teams, focusing on skill development and leadership.
- Help each student grow and mature in the areas they are pursuing while guiding them through social challenges of adolescences.

Career Networking Research – Participant | Virtual | Chicago, IL | Dewitt, MI

April 2024 – Present

- Conducted in-person and zoom interviews with finance professionals in diverse areas of finance to gain insights into different career paths.
- Gathered stories about other stories in the finance field from the range of analyst to CEO. Talked with members of companies like Piper Sandler, Fidelity, JP Morgan, and BMO.
- Gained detailed information about pathways into the finance industry and the different intricacies in different branches, companies, and positions.

NON-TECHNICAL SKILLS & INTERESTS

- **Skills and Language(s):** English, CPR/Lifeguard Certified
- **Programs:** Proficient in Microsoft 365
- **Interests:** Networking, Meeting Facilitation, Industry Research

Riya Navani

+ (408) 718.8320 | rnavani@stanford.edu | [Linkedin.com/in/riya-navani](https://www.linkedin.com/in/riya-navani)

EDUCATION

Stanford University – Stanford, CA **Expected Graduation: June 2028**
Bachelor of Science in Human Biology Minor in Management Science & Engineering Cumulative GPA: 3.5/4.0
Awards/Accomplishments: Student-Athlete (U.S. Squash National Team & Stanford Varsity Women's Squash) Don and Dorothy Koll & Evelyn Lloyd Dees Scholarships Recipient (Highly Selective Scholarship awarded on Academic & Athletic Merit), Make-A-Play Foundation
Relevant Coursework: Spring 2026: Accounting; Management Theory; Completed: AI in Medicine & Healthcare Ventures, Neuroscience, Bioengineering Principles & Innovation, Healthcare Policy and Reform, Healthcare Leadership for Financial Management.
Organizations: Stanford Athletes in Finance, Stanford Blyth Fund, Stanford ASES

PROFESSIONAL EXPERIENCE

VMO Tech, Inc. (Health-tech startup; \$10M valuation) Campbell, CA **Stanford, CA**
Financial Analyst June 2025 – August 2025

- Developed financial models and valuation scenarios for a potential PE acquisition, analyzing 3–5 revenue paths and cost structures to clarify deal feasibility and support leadership decisions on strategic positioning and growth outcomes
- Analyzed market and revenue trends across healthcare services in CA and AZ, evaluating 2 partner groups and 10+ data sources to assess expansion opportunities and inform recommendations that shaped business development priorities

Blyth Fund (Largest Student-Managed Investment Organization at Stanford) **Stanford, CA**
Portfolio Analyst Jan 2026 – Present

- Accepted into a selective analyst role within Stanford's largest student-managed fund, conducting company diligence, industry research, and valuation work to support investment theses and portfolio decisions; present final investment analyses to leadership

Snyder & Anderson Labs (#1 Nationally Rated Genetics & Top-Rated Pain Organizations, US News) **Stanford, CA**
Data & Research Associate December 2024 – Present

- Spearheaded analytics project across 50+ participants, applying statistical and technical methods to identify diabetes-related trends that informed research direction and shaped data-driven hypotheses for senior investigators
- Led integration of two genomic databases containing 10K+ data points, utilizing coding and spreadsheet workflows to enhance data accuracy and build analytical foundations that accelerated ongoing clinical research initiatives
- Analyzed experimental outputs and delivered weekly presentations to senior researchers and patients, translating complex findings into clear narratives that strengthened project relevance and supported manuscripts now under publication review

EXTRACURRICULARS

Stanford Varsity Women's Squash and U.S. Squash National Team **Stanford, CA**
#1 Ranked Player at Stanford September 2015 – Present

- Compete as Stanford's #1 player and 2x U.S. National Champion, leading Team USA to a gold medal at the 2025 PanAmerican Games and capturing the decisive match, strengthening national team performance and supporting international ranking outcomes
- Earn 2025 Stanford "Block S" Outstanding Freshman Athlete of the Year and become the first player in program history to receive dual Rookie & Player of the Year honors, elevating program visibility and contributing to recruiting and competitive success
- Lead youth training sessions for 20+ aspiring squash athletes, designing individualized mental and physical performance frameworks that built confidence, improved execution, and strengthened the development pipeline for local squash communities

Stanford Athletes in Finance (Largest & Premier Finance Organization for Top Athletes at Stanford) **Stanford, CA**
Active Member September 2025 – Present

- Engage in selective finance workshops, technical trainings, and group projects while connecting with 25+ alumni across IB, PE, and VC to build foundational modeling and valuation skills that strengthen industry readiness and recruiting outcomes

ASES / Affiliated Stanford Entrepreneurial Students Launchpad (Premier Business & Entrepreneurship Org.) **Stanford, CA**
Strategic Advisor September 2025 – Present

- Lead key workstreams for Launchpad's 2025 Moonshot initiative, mentoring 40+ participants and coordinating engagement with 15+ top VC firms to elevate venture quality, sharpen strategic thinking, and strengthen investor-facing pitch development

PUBLICATIONS & PRESENTATIONS

Keynote Presentation: British Regenerative Medicine Conference **London, UK**
"Why BMAC: When and How?" June 2024

- Delivered a keynote presentation to 50+ physicians and medical students at King's College London on emerging biotechnologies in regenerative medicine, highlighting technological advances, nanotechnology, 3D bioprinting, and AI-driven therapeutics.

Co-author on NIH and PubMed Publication **São Paulo, BR**

- Authored journal publication on Covid-19 for NIH, the pre-eminent medical institute.

SKILLS & INTERESTS

Skills: Python, Statistics, Learning R, Excel, foundational business and accounting skills (Berkeley HAAS Business Academy for Youth)
Languages: Spanish (fluent), Hindi (fluent) | **Interests:** Interests: puzzles, hot yoga, dance, exploring new coffee shops
Programs: Wharton School, University of Pennsylvania: Finance & Quantitative Modeling for Analysts

RYAN TAYLOR CHANG

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EDUCATION

University of Pennsylvania, College of Arts & Sciences | Philadelphia, PA

May 2028

Candidate for Bachelor of Arts in Philosophy, Politics and Economics, Minor: Consumer Psychology (*intended*)

- **GPA:** 3.73/4.00
- **Relevant Coursework:** Accounting, Microeconomics, Game Theory, Mathematics of Change, Macroeconomics, Business Statistics

FINANCE AND ENTREPRENEURIAL EXPERIENCE

G'EATS – *Founder and CEO* | Philadelphia, PA

January 2025 – Present

- Founded a robotic kitchen and smart locker startup backed by the Wharton Venture Lab VIP Incubator to address food waste, inequity, and unhealthy eating and spending habits in the \$30B+ U.S. college dining market
- Raised \$70K+ in non-dilutive capital through first round and pitch competitions; awarded Wharton Innovation Fund Grant
- Closed New England Innovation Academy as launch customer with a 3-year contract (\$500/mo + \$2/use), creating \$6k ARR base (\$18k TCV) and validating <12-month hardware payback.
- Lead 10+ team including engineers, school partners, and investors to develop automation technology, drive supplier onboarding, pricing analysis, and partnership growth

Make-A-Play Foundation (MAP) – *Undergraduate Fellow* | Remote – New York, NY

January 2025 – Present

- Selected as 1/40 athletes (1,200+ MAP Fellows, top 3%) to compete in Pro Bowl Games, an elite, gamified IB tournament
- Collaborated with fellow student-athletes to conduct due diligence and perform comparable company analysis for a healthcare tech startup, presenting investment recommendations to Bank of America talent acquisition sponsors in Phase 2 Winter League

ClearVue Partners – *Private Equity Analyst* | Remote – Los Angeles, CA

July 2025 – October 2025

- Conducted U.S./EU market entry diligence for robo-auto infrastructure portfolio company; built TAM, regulatory maps, and competitive benchmarks to inform CEO/board strategy in the \$100B+ robotaxi sector
- Supported development of a 5-year operating model for the company's car wash expansion, running sensitivity/scenario analyses on wash volumes, pricing, and EBITDA to optimize capital allocation, leading to 2 pilot launches in the U.S
- Built the rollout playbook - ranked markets, sourced 40+ AV/fleet/real-estate partners, and created unit economics pricing/contract templates which guided the selection of Austin and Phoenix for pilots.

Leader Bank – *VC, PE and Tech Banking Intern* | Arlington, MA

May 2025 – August 2025

- Built and scaled Leader Link, a capital-matching platform linking startups to 50+ investors across VC, PE, and accelerator partners; integrated venture debt and equity financing solutions to broaden funding access
- Conducted onboarding and financial due diligence for 10+ high-growth clients, analyzing revenue drivers, unit economics, and market positioning to evaluate product-market fit and structure tailored banking solutions

Agrify (NASDAQ: AGFY) – *Student Intern* | Hybrid – Boston, MA

June 2022 – August 2024

- Analyzed SEC filings (10-K, 8-K) for NASDAQ compliance, cross-checking disclosures for accuracy and producing compliance write-ups to strengthen IPO readiness and mitigate regulatory risk
- Contributed to sales, acquisitions, and due diligence during IPO process, supporting cross-team coordination and documentation

ATHLETICS AND COMMUNITY DEVELOPMENT

UPENN Marks Family Writing Center – *Student Fellow and Tutor* | Philadelphia, PA

August 2025 – Present

- Selected as 1 of 15 fellows for a nationally recognized program awarded the CCCC Writing Program Certificate of Excellence.
- Tutor and mentor undergraduate students on research papers, course assignments, and application essays, applying best practices from a semester-long pedagogy course to strengthen clarity, structure, and argumentation

Penn Men's Varsity Golf – *Competitor* | Philadelphia, PA

August 2024 – Present

- Represent the University of Pennsylvania in collegiate golf, competing in the Ivy League Championship, All-American Intercollegiate, with top individual finishes including 11th at the Alex Lagowitz Memorial and 8th at the Roar EE Invitational
- Balance rigorous academic schedule with 35+ hour weekly athletic commitment, via excellent time management and discipline
- Lead team meetings to develop weekly team skills challenges to improve stroke averages and monthly community service initiatives including teaching golf to West Philly students and food packaging for cultural organizations

ADDITIONAL INVOLVEMENT, SKILLS AND INTERESTS

Activities: Venture Lab fellow, Penn Capital Partners, Phi Gamma Delta, Fellowship of Christian Athletes, Wharton Sports Business

Skills: Chinese Mandarin (Fluent), Excel (WSP), Powerpoint, Financial Analysis, Generative AI & Ethics, Non Violent Communication

Interests: Golf, Basketball, Social Entrepreneurship, Cello, Tokyo Jazz, Collecting Snow Globes, and Watching Figure Skating

Salil Khanduja

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EDUCATION

Columbia University – New York, NY

Bachelor of Arts, Financial Economics

Expected Graduation: May 2028

Cumulative GPA: 3.54/4.0

Clubs & Societies: Columbia Athletics Finance Society, Student Athletic Advisory Council, Sigma Nu Delta Gamma

Relevant Coursework: Intermediate Macroeconomics, Calculus III, Calculus Based Statistics, Principles of Economics

Certifications: Wall Street Prep: Accounting & Financial Statement Analysis Certification

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Nov 2025 – Present

Selected Transaction Experience

- Medallion — *Healthcare Technology / Provider Enablement Strategic Advisory Simulation*
 - Spearheaded market analysis for a healthcare technology advisory case study, identifying 3 secular growth drivers including aging demographics, provider shortages + credentialing inefficiencies, anchoring ~\$9K/day revenue leakage to frame investment relevance for team
 - Constructed banker-ready Financial Snapshot projecting LTM and forward revenue, EBITDA margins, and leverage, benchmarking against Health Catalyst public disclosures to surface 2–3 competitive strengths & liquidity risks informing capital structure + execution considerations
 - Developed conservative operating and margin assumptions using IPO-stage healthcare SaaS comparables, calibrating revenue growth and ~-40% EBITDA benchmarks to reflect early-stage scaling dynamics & support defensible valuation ranges under limited disclosure for BofA
 - Authored targeted diligence questions on valuation methodology, comparable selection, and risk factors as Planning Phase owner to guide Execution Phase modeling, enabling teammates to accelerate 5-year projections, comps analysis, and scenario testing with analyst-level rigor

Ivy Athlete Recruiting

Co-Founder

New York, NY

Mar 2025 – Present

- Launched a mentorship platform connecting 100+ Ivy League athletes with prospective recruits, building the operating model, service structure, and GTM strategy to drive early adoption, scalable growth, and predictable user acquisition
- Interviewed and onboarded 150+ student-athletes across 8 Ivy programs, creating standardized onboarding, matching, and QA workflows that improved mentor–mentee fit, session consistency, and platform reliability
- Designed financial models and led strategic planning across pricing, cash-flow forecasting, and cost management, maintaining positive net working capital and establishing a sustainable, repeatable operating foundation for expansion

True Up Capital Advisors

Me&A and Communications Intern

Remote

Jun 2025 – Jul 2025

- Developed a sports-and-business podcast strategy by analyzing 10+ competitor channels and audience segments, expanding investor outreach and strengthening True Up's brand presence across digital platforms
- Conducted market and peer research on 20+ comparable firms, refining brand positioning and content themes to improve engagement and support the firm's broader advisory and business-development initiatives
- Collaborated with senior leadership to define brand messaging, content vision, and communication cadence, producing materials that enhanced external storytelling and supported long-term relationship building with investors
- Assisted in launching a \$50M private equity fund by contributing to market landscaping, preliminary return-profile modeling, and LinkedIn content development to increase awareness among prospective LPs

United Nations

Data Analyst Intern

New York, NY

Mar 2025 – May 2025

- Contributed to a UN Environment Day initiative by testing in-game intent features designed to raise global awareness of plastic pollution, supporting the rollout of an educational campaign embedded in a platform with 15M+ users
- Analyzed large-scale player engagement datasets, producing impact reports that assessed retention, behavior change, and engagement lift across 15M+ global participants, informing refinements to the campaign's messaging strategy
- Deciphered user-behavior trends using regression models, identifying key predictors of engagement, playing patterns, and drop-off points to provide actionable insights that improved intervention design and program effectiveness

EXTRACURRICULARS

Columbia University Men's Varsity Golf (NCAA Division I Golf)

NCAA Division I Student-Athlete

New York, NY

Aug 2024 – Present

- Compete as a D1 golfer while managing 40+ hours/week of training, travel, and academics, building discipline in a high-performance environment
- Earned a freshman starting spot in the first three tournaments, contributing to a team victory and demonstrating readiness to perform under pressure
- Transitioned to an honorary assistant coach after season-ending surgeries, supporting practice planning, player development, and strong team culture

Hand in Hand USA Club

Youth Lead Volunteer

Naperville, IL

Jan 2018 – Present

- Raised \$100K+ annually to fund education and housing for 150+ children, leading youth volunteer operations and coordinating charity golf events
- Secured major sponsors (Wilson Sporting Goods, Andaz/Hyatt) by developing tailored sponsorship pitches that strengthened partner relationships
- Managed end-to-end event logistics—vendor coordination/scheduling/registration/financial tracking—to maximize revenue generation
- Developed donor-outreach messaging and impact-focused campaign materials, increasing recurring contributions and improving donor retention

SKILLS & INTERESTS

Skills: Excel, Google Workspace, PowerPoint, Word

Languages: Intermediate Spanish (conversational), Hindi fluency (Conversational)

Interests: Robinhood, Fantasy Football, Pickleball, Puzzles, DJing, Hiking, Weightlifting, Vinyl Collecting, Beli

Sophia Hu

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3927 Rockwood Farm Road, Newtown Square, PA, 19073

EDUCATION

Columbia University, Columbia College

- Bachelor of Arts in **Statistical Economics**

New York, NY
Fall 2024-Spring 2028

The Episcopal Academy

- SAT: 1540 (Math-800, Critical Reading-740); Weighted GPA: 4.26/4.0
- Coca Cola Semifinalist; National Merit Finalist; Cum Laude Society (top 10% of class); AP Scholar with Distinction; National Council of Teachers of English (NCTE) The Achievement Awards in Writing Contest: Superior Class; Scholastic Writing and Art Award: Gold Keys in Critical Essay and Architecture and Industrial Design; 2nd Place (\$2500) at High School Analytics and Data Visualization National Competition

Newtown Square, PA
Fall 2021-Spring 2024

PROFESSIONAL EXPERIENCE

Paraform

Content Marketer

- Authored and published multiple blog posts focused on key trends and insights in the recruiting industry, covering topics such as recruitment strategies, hiring practices, and evolving trends in talent acquisition
- Leveraged Search Engine Optimization (SEO) techniques to optimize visibility to increase overall engagement for the website
- Worked closely with a cross-functional team to plan out a monthly content strategy
- Brainstormed ideas for blog topics by conducting extensive research on industry trends, competitor content, and audience interests

Newtown Square, PA
Summer 2024

Vector Marketing

Sales Representative

- Developed and delivered engaging sales presentations to present product benefits.
- Engaged with customers post-sale to assess their satisfaction and gather immediate feedback for continuous improvement.
- Practiced presentation and communication skills with customers to sell Cutco Cutlery
- Generated new customers through referrals and leads

Havertown, PA
Summer 2024

AIGOLearning, Stem for All Initiative

Public Relations Director

- Engaged with directors of nonprofit organizations, libraries, and museums to support initiatives aimed at promoting coding literacy, fostering partnerships that encouraged broader access to STEM education
- Recruited 1130+ children globally to take 30+ free coding classes
- Create and distribute promotional emails, posters, flyers, raising \$8000+ via sponsorships to spread the power of education for underprivileged and underrepresented groups in STEM
- Recruited and interviewed 20+ potential candidates for the leadership team

Newtown Square, PA
Fall 2022-Summer 2024

SuperJoey Foundation

Fundraising Director

- Plan fundraising events such as concerts and tennis tournaments to raise money for the Ronald McDonald House in Philadelphia.
- Organized raffle events and design t-shirts to sell at fundraisers and raised \$3000
- Sold snacks and drinks during town's local July Fourth Parade and raised \$1500
- Prepare and serve breakfast, lunch, and dinner to Ronald McDonald families over Thanksgiving, Christmas, Mother's Day, Lunar New Year at the Ronald McDonald House

Philadelphia, PA
Spring 2020-Summer 2024

LEADERSHIP EXPERIENCE

Columbia University NCAA Division 1 Varsity Squash

Player

- Commit 10+ hours a week to meetings, practices, strength/conditioning, and games during both the fall and spring semesters
- Develop leadership, work ethic, desire to succeed, and the ability to work in a team, under pressure, and in the face of adversity
- Advocate for the team as a representative for the Student Athletic Advisory Council (SAAC) to improve the student-athlete experience

New York, NY
Fall 2024-Present

Episcopal Academy Scholium

E-Scholium Editor-in-Chief

- Wrote about community events and for monthly issues for the school's newspaper for a 550+ student body
- Interviewed students and faculty for monthly podcast issue and recruited new students as writers
- Created social media content and increased social media engagement by 300 percent in one month

Newtown Square, PA
Fall 2021-Spring 2024

Episcopal Academy Squash Club

Squash Coach

- Assist squash clinics and summer camp of ages 5-14, providing hands-on guidance and fostering an engaging learning environment that promotes growth and confidence
- Supervise matchplay and small group coaching for drills and fitness sessions

Newtown Square, PA
2021-Present

SKILLS AND INTERESTS

Computer Skills: Microsoft Word, Excel, and Powerpoint, Java

Interests: Traveling, WSJ Podcasts, Chinese (Fluent), Spanish (conversational)

Taylor F. McAndrew

508.243.6156 | taylorf5@mit.edu | [Linkedin.com/in/taylor-mcandrew/](https://www.linkedin.com/in/taylor-mcandrew/)

EDUCATION

Massachusetts Institute of Technology – Cambridge, MA

Expected Graduation: May 2028

Bachelor of Science, Finance (15-3) and Computer Science, Economics, and Data Science | ACT: 36

Cumulative GPA: 5.0/5.0

Accomplishments: Varsity Student-Athlete (MIT Women's Lacrosse), Director of Finance (MIT Alpha Phi), Valedictorian (Oliver Ames High School)

Relevant Coursework: Intro to Financial and Managerial Accounting, Managerial Finance, Intro to Comp. Sci. & Programming, Intro to Statistical Methods in Economics, Multivariate Calculus; **Harvard SSP**, International Finance and Microeconomics

Certifications: Bloomberg Market Concepts Certification, Cornell University Certificate in Women's Entrepreneurship, Wall Street Prep Accounting

PROFESSIONAL EXPERIENCE

Inspire Brands

Atlanta, GA

Incoming Corporate FP&A Summer Intern

Summer 2026

- Expected to support Corporate FP&A, Treasury, and EPMO by analyzing financial drivers, building planning models, and producing executive-ready reporting to inform enterprise-wide budgeting and strategy, while collaborating with a cross-functional intern team to deliver a capstone solution

Bank of America

Remote

MAP Investment Banking Fellow

Dec 2025 – Present

Selected Transaction Experience

Confidential Emerging Healthcare Company — *To Be Selected (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*

- Own and lead the Control Phase by pressure-testing all prior analysis (validating assumptions, challenging model outputs, and ensuring the investment story holds under scrutiny) to transform raw numbers into a defensible, senior-banker-ready thesis to be presented live to BoFA analysts on 2/9/2026
- Build a 3-part Investment Thesis by evaluating market opportunity, margin expansion, and execution quality, anchoring each point with ~5 OKRs and KPIs and synthesizing insights into a clear conclusion that articulates why the deal makes strategic and financial sense
- Identify 2-3 core counterpoints (i.e., regulatory, execution, or market-cycle), support them with sourced mitigants, and draft Monitoring-Phase diligence questions to tighten the team's assumptions, validate timing, and ensure the final recommendation reflects fully pressure-tested judgment

MIT Course 15 Research: Applications of AI in Business

Cambridge, MA

Research Assistant to Melissa Webster, MIT Sloan School of Management

May 2025 – Present

- Analyze emerging AI implementations across finance and corporate functions by conducting industry-specific interviews and secondary research, identifying patterns in adoption, operational impact, and value-creation drivers for early-career analyst roles
- Investigate how AI is reshaping Junior Analyst responsibilities in Investment Banking, synthesizing workflow changes, automation risk, and upskilling needs into a research paper and two faculty-supervised presentations on the implications of AI in business and IB

MIT Center for Energy and Environmental Policy Research

Cambridge, MA

Research Assistant to Dr. John Parsons, Sr. Lecturer, MIT Sloan School of Management

Jan 2025

- Conducted quantitative analysis on hydroelectric generation systems, synthesizing operational, environmental, and capacity-factor data to evaluate facility performance, constraints, and long-term viability under varying hydrological conditions

UBS, Hingham Street Partners

Rockland, MA

Fellow

May 2024 – Aug 2024

- Researched the competitive impact of modern AI across financial markets and adjacent industries, synthesizing regulatory shifts, adoption patterns, and productivity effects into a live presentation for UBS mentorship leads
- Built and delivered a full stock pitch for investment teams, including SWOT analysis, DCF modeling, and a defensible investment thesis grounded in sector trends, valuation drivers, and relative-value positioning

Human Services Management Corporation

Milford, MA

Intern to CFO

June 2023 – Aug 2023

- Supported the CFO by coordinating across accounting, AP, and finance teams for 4 total entities (2 nonprofit, 2 for-profit), streamlining workflows and improving cross-department handoffs during month-end close
- Performed 20+ bank reconciliations, refreshed budget models, and processed disposal of 15+ fully depreciated assets, strengthening reporting accuracy and supporting preparation for annual audits

EXTRACURRICULARS

MIT Alpha Phi

Cambridge, MA

Director of Finance

Sep 2025 – Present

- Oversee full financial operations for 100+ MIT Alpha Phi members by managing BillHighway billing accuracy and compliance, preparing and collecting financial agreements, and enforcing delinquency policies to maintain chapter accountability and cash-flow stability

MIT Scholars of Finance

Cambridge, MA

VP of Professional Development

Sep 2024 – Present

- Lead professional development for MIT Scholars of Finance by organizing workshops with alumni and industry practitioners, facilitating principle-based discussions and panels, and strengthening member readiness across technical, ethical, and career-focused skill areas

MIT Varsity Lacrosse

Cambridge, MA

Varsity Athlete

Sep 2024 – Present

- Compete as an NCAA Division III varsity lacrosse athlete, contributing to MIT's first NEWMAC Championship in 10 years while demonstrating high-performance discipline, teamwork, and commitment across training, competition, and team standards

SKILLS & INTERESTS

Skills: Prompt Engineering, NetSuite, Python (Intro), SWOT Analysis, MS Excel & Powerpoint, Public speaking, Collaboration

Interests / Involvement: Alpha Phi, Boston Sports, Baking, Artificial Intelligence, Teaching/Coaching, Behavioral Economics

TYLER B. INGRAM-EISER

Austin, TX 78746

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EDUCATION

YALE UNIVERSITY

New Haven, CT

Intended Double Major: Economics and Mechanical Engineering | 3.8 GPA | 36 ACT

Expected May 2028

Relevant Coursework: Game Theory, Macroeconomics, Microeconomics, Physics, Calculus II, Econometrics, Mechanical Design

WORK EXPERIENCE

YALE UNIVERSITY

New Haven, CT

Undergraduate Research Assistant

April 2025 - August 2025

- Collaborated with Yale Economics professor and United States department of energy-affiliated project team on data analysis related to energy economics
- Conducted data collection and project outreach for all 169 townships in Connecticut; Created published figures using statistical analysis in Excel and R

Admissions Office Tour Guide

April 2025 - Present

- Selected from pool of 150+ applicants to represent Yale as a tour guide for prospective families and visitors
- Lead campus tours for audiences of 50; conveyed Yale's Student experience with clarity and enthusiasm

LEADERSHIP AND COMMUNITY DEVELOPMENT

YALE UNIVERSITY

New Haven, CT

Division 1 Football Player

April 2025 - August 2025

- Dedicate 40+ hours per week to practice, film, and competitions
- Selected as the only freshman to lead my class during team leadership retreat

Mandi Schwartz Bone Marrow Registry Drive Committee Member

January 2025 - May 2025

- Organized the largest and most successful collegiate bone marrow registry drive in the United States
- Led community outreach, speaking on behalf of the drive on the Connecticut state news multiple times
- Successfully registered over 570 people as potential life saving donors for children with cancer

WESTLAKE HIGH SCHOOL

Austin, TX

Lacrosse and Football Player

August 2023 - May 2024

- One of the only people in Westlake High School history to be elected to serve as the captain of both the football and lacrosse teams
- Led and motivated 150+ athletes, fostering a culture of accountability, integrity, and fun
- Served as a liaison between the coaches, team, and staff to enhance team cohesion for both teams
- Texas High School Football 6A State Champions in 2021

Re:WILD.org

Austin, TX

Re:Wild Your Campus Advocate

August 2023 - May 2024

- Participated in invitation-only Ground Up Advocacy seminar to learn actionable strategies to ensure safer pesticide use on campus
- Led year long outreach campaign to educate 3,500+ students at Westlake High School on sustainable habits

MAKE A PLAY FOUNDATION

New Haven, CT

Fall Fellow Team Captain

August 2025 - December 2025

- Selected as Captain after finishing in top 1% of 250+ MAP athletes, advancing to lead a team of 5 on Bank of America Global Markets' Quantitative Strategies case to design, backtest, and evaluate a deployable trading strategy.
- Assign teammates to 5 roles (planning, execution, control, monitoring, closure) to simulate Bank of America Global Markets/QSG workflows and create clear accountability.

RELEVANT SKILLS

Technical Skills: Proficient in R Studio, Microsoft Suite

Languages: English (Native), Spanish (Proficient)

Victoria Pevzner

vpevzner@nd.edu | www.linkedin.com/in/victoria-pevzner/ | South Orange, NJ

EDUCATION

University of Notre Dame, Mendoza College of Business | Notre Dame, IN Class of 2028
Candidate for Bachelor of Business Administration | Major: Finance | SAT: 1520 GPA: 3.6

EXPERIENCE AND LEADERSHIP

Makrod Investment Associates | Verona, NJ July 2025 – August 2025

Investment Advisory Summer Intern

- Researched companies in the energy, healthcare, and pharmaceutical industries to inform investment recommendations
- Created client presentations, incorporating portfolio summaries, asset allocations, and top holdings into professional PowerPoint decks to support client meetings
- Attended virtual industry webinars and presentations to synthesize insights into comprehensive reports and actionable insights, equipping clients with timely perspectives on market developments and emerging trends

Student International Business Council | Notre Dame, IN

Student-Athlete Division Director

December 2025 – Present

- Drive division strategy, lead development of corporate partnerships; expand access to business education, hands-on projects, and professional development for varsity athletes

Bank of America Leveraged Finance Project Travel Team Analyst

September 2025 – December 2025

- Partnered with a team of students to evaluate an LBO candidate's credit profile; analyzed cash flows, benchmarked against peers, and reviewed industry trends and prior transactions
- Proposed a final LBO financing structure supported by leverage, FCF, and recession-case performance analyses
- Collaborated with BofA professionals to refine materials to firm standards; presented the final deck to analysts, associates, and VPs in the New York office

McKinsey and Co. Project Travel Team Leader

May 2025 – July 2025

- Co-led a consulting project for ExxonMobil's carbon capture strategy, driving issue identification, prompt development, executive summary creation, and deliverable execution
- Managed project workflow through weekly team meetings and coordinated with McKinsey consultants on deliverables
- Prepared the final deck that was successfully presented at McKinsey's Chicago office and received highly positive feedback

McKinsey and Co. Project Travel Team Analyst

September 2024 – December 2024

- Collaborated with a team of students to address a non-profit's operational and funding challenges, developing strategies to improve donor retention and streamline data collection through technology integration for long-term business sustainability
- Presented findings and recommendations to McKinsey and the non-profit's leadership, enhancing presentation skills and building professional connections

Make-A-Play Foundation | Remote

June 2025 – August 2025

"Victory Formation" Alternative Investments Fellow

- Selected to participate in a national leadership competition for high-achieving college athletes, ranking in the top 5% of all Fellows for Phase 1; qualified for Phase 2 based on strong performance in Phase 1
- Collaborated with a team of 3 to identify a new software company that aligns with the investment strategy of Vista Equity Partners; performed financial statement analysis, created financial forecasts, and recommended a value creation strategy

NCAA ATHLETICS AND SPORTING ACHIEVEMENTS

Notre Dame Division I Fencing Team | Notre Dame, IN September 2024 – Present

Foil Fencer; Starter; Recipient of the ACC-All Academic Team Honors Award

- Balance 30+ hours per week of training, competition, and travel with a rigorous academic schedule, demonstrating strong time management, discipline, resilience, and performance under pressure
- Contributed as a core member of Notre Dame's 2025 National and ACC Championship-winning fencing team

U20 USA National Team | Colorado Springs, CO

February 2024 – Present

Foil Fencer

- 2025 World Champion (Team) in Wuxi, China; 2024 Pan American Junior Champion (Individual and Team) in Rio de Janeiro, Brazil; Silver at 2025 U20 World Cup in Tbilisi, Georgia; Bronze at 2024 U20 World Cup in Istanbul, Turkey

SKILLS, INTERESTS, AND AWARDS

Skills: Microsoft Office Suite, Canva, Adobe Lightroom

Interests: Traveling, Skiing, Cooking, Listening to Fleetwood Mac

Clubs: SIBC, Student-Athlete Advisory Committee, Undergraduate Women in Business, Wall Street Club

VINCENT YANG

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EDUCATION

Northwestern University

Bachelor of Arts | Major: Economics & Mathematics | Minor: Artificial Intelligence

Evanston, IL

Expected June 2028

- **Cumulative GPA:** 4.00/4.00 | **Dean's List:** 3 / 3 | **SAT:** 1530
- **Relevant Coursework:** Intermediate Macroeconomics, Intermediate Microeconomics, Linear Algebra, Multivariable Differential Calculus, Multivariable Integral Calculus, Probability and Statistics, Sequences and Series, Fundamentals of Computer Programming

PROFESSIONAL EXPERIENCE

Integrus Partners

Investment Banking Summer Analyst

Dallas, TX

June 2025 – August 2025

- Assessed potential acquisition targets by carefully analyzing financial metrics, market positioning, competitive landscape, and growth potential, synthesizing insights to prioritize high-value opportunities and support strategic deal recommendations for senior bankers
- Engineered detailed financial models for potential dental clinic acquisitions, analyzing the cash, equity, and earnout components of deal
- Engaged in seller calls, translating model outputs into clear recommendations on transaction proceeds and deal terms for negotiation

Rolling Thunder Ventures

Venture Capital Spring and Summer Analyst

Boston, MA

March 2025 – August 2025

- Constructed a predictive investment model using a gradient boosting framework to assign weighted regression factors to key performance indicators, enabling data-driven prioritization of future opportunities based on projected exit outcomes and returns
- Benchmarked 10 portfolio companies against peers to recommend exit strategies, appropriate valuation multiples, and strategic buyers

A & J Ventures

Private Equity Winter and Spring Analyst

Atlanta, GA

December 2024 – May 2025

- Researched 150+ small businesses across the residential infrastructure services industry in Atlanta metro area for potential acquisition
- Built and refined LBO models from CIMs, focusing on structuring creative seller financing arrangements to determine initial offer price and reach target IRR; incorporated working capital adjustments on purchase price and financial statement normalization

Sun Haven Partners

Private Equity Winter Analyst

Chicago, IL

January 2025 – March 2025

- Crafted investment theses and slide decks supporting overlooked growth in surgical equipment and commercial generator industries
- Reviewed CIMs and presented initial investment recommendations based on financial performance and competitive positioning

LEADERSHIP & ACTIVITIES

MAP x Guggenheim Securities Case Competition

Participant

Remote

October 2025 – Present

- Selected as captain after ranking in the top 1% of participants, earning opportunity to lead a five-member team in Guggenheim's Consumer & Retail case competition; tasked with driving collaboration, strategic thinking, and deliverables under tight deadlines
- Set the investment direction by leading primary company selection, conducting detailed industry and competitive analysis, and shaping the strategic rationale, ensuring all five teammates were fully aligned on the deal thesis, framing, and overall investment narrative
- Oversaw the successful delivery of five key outputs – including the company overview, financial summary, valuation snapshot, investment thesis & deal rationale, and strategic fit – while coordinating team workflows and maintaining consistent quality standards
- Guided final preparations for the case, coordinating detailed last-stage reviews, refining analytical sections, and ensuring seamless transitions across all project phases; focused on aligning content, visuals, and delivery to meet client-facing presentation standards

Northwestern Capital Management

Analyst & Investment Committee

Evanston, IL

January 2025 – Present

- Selected as 1 of 9 members to develop and execute bottom-up investment strategy for \$25,000 student-run portion of endowment
- Pitched a long position on ON Holding AG (NYSE: ONON), focusing on tailwind of increased pricing power in DTC segment due to rapid expansion into the tennis world, creating more brand exposure; reflected investment thesis into DCF model assumptions
- Conducted primary and secondary research in a team of 5 for a long position on Veeva Systems (NYSE: VEEV), citing interviews and discussions with sector professionals to project higher than consensus ARPU of top customers and faster tail end customer growth

Northwestern University Men's Tennis Team

Student-Athlete

Evanston, IL

September 2024 – Present

- Dedicated 20+ hours per week to on-court training, strength and conditioning, and recovery, while managing a rigorous course load
- Strengthened skills in time management, discipline, and performance under pressure, consistently meeting demanding team standards

ADDITIONAL

Skills: Microsoft Suite (Word, PowerPoint, Excel, Publisher), Python, Java, HTML, CSS, R, Racket, React Native, Chinese (Mandarin)

Membership: Northwestern University Investment Banking Club (NUIBC), NU Private Equity & Venture Capital Club (PEVC)

Awards: Big Ten Freshman of The Week (3/5/25), 2024 WA State Open Champion, 2023 OR State Open Champion, AP Scholar Award

Interests: Golf, Skiing, Poker, Sauna, March Madness, Late-Night Walks, Catan, Motion Photography, Baking, Travel, House Music

William Ma

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EDUCATION

Harvard University

Economics and Applied Math

Cambridge, MA

Expected Graduation Date: May 2028

- Cumulative GPA: 4.0/4.0
- Finance Relevant Coursework: Econ 1010a – Intermediate Microeconomics; Econ 1011b – Advanced Macroeconomics; Econ 50a – Using Big Data to Solve Economic and Social Problems; Stat 104 – Introduction to Quantitative Methods in Economics; Math 21a – Multivariable Calculus; Math 21b – Linear Algebra and Differential Equations

PROFESSIONAL EXPERIENCE

Corbel Capital

Summer Analyst

Dublin, Ireland

June 2025 – August 2025

- Quantified the GRC sector's TAM by building out a bottoms-up analysis in Excel, estimating a 5 billion dollar market, presenting findings to CalQRisk's executive team for strategic decision-making.
- Authored an investment committee report on CalQRisk, including a valuation assessment and market positioning analysis that contributed to the development of an Information Memorandum for the company in preparation for private investment outreach
- Conducted market research on 16 companies within the Ireland golf tourism industry to support the CEO and associates in the acquisition of Golf Vacations Ireland
- Evaluated Sunnking Inc.'s market position within the electronics and IT asset disposition industry to support due diligence efforts on a potential acquisition

Palo Alto Investors

Summer Investment Intern

Palo Alto, CA

May 2025

- Engaged with 10+ investors across various sectors in Silicon Valley, including technology venture capital, mutual funds, and private equity. Gained exposure to investment strategies across multiple industries and verticals, including healthcare, commodities, consumer goods, energy, financial services, hotel management, and entertainment.

Harvard University

1010a Course Development and Incoming 1010a Course Assistant

Cambridge, MA

June 2025 – December 2025

- Collaborated with Professor Maxim Boycko to develop long-form problems for nine problem sets, as well as the midterm and final exams for the 2025 Fall Semester
- Leading weekly class section, hosting office hours, and grading exams during the 2025 Fall Semester

ACTIVITIES

Harvard Golf Team

- Season: 15 weeks (fall and spring), 9 tournaments/yr, 25+ hrs/wk of practice
- 2024-2025 Alex Vik '78 MVP Award
- 2025 All-Ivy League Second Team

Cambridge, MA

August 2024 - Present

National Junior/Amateur Golf

- Rolex Junior All American Honorable Mention in 2023
- Rolex Scholastic Junior All American in 2023
- Ranked as high as 7th in the nation by Junior Golf Scoreboard

Nationwide

January 2014 - August 2024

Ivy Golf Network

Harvard Chapter Co-Founder

Cambridge, MA

April 2025 – Present

- Coordinated initial outreach to over 100 Harvard students, helping the growth of a golf-centered Ivy League community initiative
- Planning and executing 2+ golf clinics and events for Harvard students each semester starting in Fall 2025 and beyond

Harvard Financial Analysts Club

Spring Comp Participant

Cambridge, MA

February 2025 – April 2025

- Developed an understanding of core accounting principles and gained exposure to financial modeling
- Executed a business valuation by developing an investment thesis and constructing a detailed 5-year Discounted Cash Flow (DCF) model on Lockheed Martin

SKILLS & INTERESTS

Technical Skills: Python, R Studio, Microsoft Excel

Interests: Piano – avid player of 14 years and classical music enthusiast; Pickleball – recreational singles and doubles player

Languages: English (native), Mandarin (conversationally fluent)

Will Otto

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EDUCATION

Emory University, Goizueta Business School

Bachelor of Business Administration, Finance, Minor: Italian
Cumulative GPA: 3.74/4.00

Atlanta, GA

May 2028

Relevant Courses: Accounting, Corporate Finance, Business Communications, Business Data Analytics, Business Economics

Emory College Italian Studies Program

Bologna, Italy

Summer 2025

WORK EXPERIENCE

Morgan Stanley (RHO Group)

Raleigh, NC

Wealth Management Summer Intern

Jun. 2025 – Aug. 2025

- Constructed an alternative investment market map for retail investors across private credit, PE, real estate, and infra
- Created excel-based analysis of RHO Group's investments to analyze performance of key money manager relationships
- Attended client meetings and contributed to discussions around new portfolio allocation to alternative investments
- Presented to RHO leadership, analyzing 10+ funds, including historical returns, portfolio company exposures, and fee structure

SAS Institute Inc.

Cary, NC

Corporate Planning and Public Readiness Internship

Apr. 2024 – Jun. 2024

- Met with Investment Banks and Consulting firms pertaining to IPO preparation and company valuation in the future
- Engaged with Executive Leadership team about the corporate goals over the next two years, leading to 10 core goals
- Connected with Marketing to complete initial design efforts on a Challenge Coin to recognize team members' work

LEADERSHIP & COMMUNITY INVOLVEMENT

Emory University Men's Basketball, *Point Guard*

Aug. 2024 – Present

- Contributed as a student-athlete on nationally-ranked team and competed in NCAA tournament, advancing to the Elite 8
- Dedicate 30+ hours a week to practicing, analyzing film, weight lifting, traveling and playing a nationwide schedule
- Demonstrate leadership by motivating teammates and supporting a culture of discipline, teamwork, and accountability
- Manage time effectively to balance athletic commitments with academic responsibilities and personal development

Atlanta Sports Businesses Symposium, *Sponsorship Lead*

Sep. 2025 - Present

- Built Partnerships with businesses in Atlanta and nationwide to secure sponsorships and financial support for the event
- Organized and developed 4 expert panels, focused on investing in sports, agency and law, marketing, and broadcasting
- Secured a fireside chat with Atlanta Hawks and State Farm Arena CEO Steve Koonin, serving as the event keynote speaker

Goizueta on Wall Street, *Member*

Aug. 2025 - Present

- Completed technical workshops on valuation, basic accounting, and corporate finance, developing practical skills
- Engaged in case studies and mock interviews with peer mentors and career coaches to enhance technical knowledge

Scholars of Finance, *Southeast Region Symposium Chair*

Feb. 2025 - Present

- Collaborated with like-minded peers to develop financial literacy, leadership skills, and career readiness in finance
- Coordinated logistics, speaker outreach, and event programming for SOF Southeast Region in a one-day conference

Goizueta Book Club, *Member*

Feb. 2025 - Present

- Enhanced presentation and public speaking abilities by leading book discussions on different segments of readings
- Applied insights from self-development books to practical exercises in teamwork, accountability, and goal-setting

Emory Economics Investment Forum (EEIF), *Market Research Analyst*

Feb. 2025 – May 2025

- Conducted weekly research and analysis on financial markets, macroeconomic trends, and investment opportunities
- Strengthened communication and analytical skills through written reports and verbal presentations to club members

ADDITIONAL INFORMATION

Other Activities: Edenton Street Methodist Church volunteer, USA Basketball assistant, Sigma Alpha Epsilon Fraternity, Sophomore Finance Academy, Goldman Sachs Possibilities Summit 25, Walk for Hope, Leukemia Lymphoma Society

Skills: Microsoft Office (Word, Excel, PowerPoint, and Outlook), Italian (Beginner), Factset, Canva, time-management

Interests: College Basketball, The Masters, Christopher Nolan Movies, Poker, Lake Como, Italian Cooking, Country Music

William Xu

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EDUCATION

Boston College – Carroll School of Management

B.S. in Management, Concentration in Finance; B.A. in Computer Science

Chestnut Hill, MA

Expected May 2028

- **GPA:** 3.86 / 4.00

- **Relevant Coursework:** Fundamentals of Finance (IP), Principles of Economics, Financial Accounting, Excel

ATHLETICS

Boston College Fencing

Division I Men's Saber

Chestnut Hill, MA

Aug 2024 – Present

- **Current NCAA Record:** 19-4
- **Best National Rankings:** 9th Cadet (U17), 23rd Juniors (U20), 35th Seniors (Olympic Team Qualification)
- Balance 20+ hours a week of practice, film review, team meetings, competitions and travel with academics

WORK & LEADERSHIP EXPERIENCE

PSP Investments

Incoming Private Credit Summer Analyst

New York, NY

Jun 2026 – Aug 2026

Catalyst Mutual Funds

Equity and Credit Research Analyst

New York, NY

May 2025 – Aug 2025

- Performed detailed credit analysis of Warrior Met Coal, forecasting 5 quarters of liquidity and evaluating Blue Creek project risks, driving the decision to include the company's bond in the IIXIX fund at 4.8% weighting
- Pitched Ford Motor Credit Company's bond to the portfolio manager, conducting in-depth credit risk analysis that resulted in the bond's 4.8% allocation to the IIXIX fund, generating a 3.3% unrealized gain from price appreciation
- Produced 3-page equity research reports on mid-cap growth companies such as NuScale, Kratos and Life360, analyzing respective industries, competitive positionings and long-term prospects to support investment decisions

Boston College Investment Club

Executive Board, Director of TMT Sector & Assistant CIO

Chestnut Hill, MA

Sep 2024 – Present

- Conduct research, generate investments and build pitches to invest ~\$1.6MM of BC's endowment in equities
- Lead 20 analysts at weekly analyst meetings to research and evaluate the viability of current and future holdings within TMT, creating comprehensive pitches for companies such as ASML and NVDA for 300+ club members
- Coordinate with the executive board to maintain coverage on 30+ portfolio holdings, review 350+ analyst applications, develop educational materials and manage communications between analyst teams and members

Private Tutoring Services

Founder

Los Altos, CA

Oct 2023 – Jun 2024

- Acquired 3 clients and maintained 6 weekly paid sessions through outreach efforts within high school community
- Provided individualized instruction across math courses from Honors Algebra II through Calculus for grades 10-12
- Increased student grades by up to 12% on average, earning 100% positive feedback from both parents and students

The Fencing Center Summer Camp

Co-Organizer

San Jose, CA

Mar 2023 – Jun 2023

- Designed curriculum, activities, conditioning and fencing drills for 20+ kids aged 6-14 to enhance fencing interest
- Partnered with The Fencing Center, a local club, to provide students with gear, facilities and training free of charge
- Leveraged network as a high-ranked fencer to market and advertise the camp to increase accessibility for new students and grow the community, leading to continued participation of ~30% of students in fencing post-camp

LANGUAGES, SKILLS, ACTIVITIES & INTERESTS

Languages & Skills: Mandarin (Fluent), Japanese (Basic), Python (Intermediate), Java (Intermediate), C (Basic)

Activities: Chinese Student Association, Intramural Dodgeball and Handball, Chi Alpha at Boston College

Interests: Japanese Temples, It's Murph Concert, Fried Liver Opening in Chess, Cooking Mushroom Risotto, Golf