

Alexis L. Li

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EDUCATION

Johns Hopkins University | Krieger School of Arts and Sciences

Bachelor of Arts in Economics & Molecular and Cellular Biology

Baltimore, MD

Expected Graduation: May 2029

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

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

- Omada Health — *Digital Chronic Care Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Led Planning Phase market framing for Omada, synthesizing 3 macro healthcare trends including \$5.3T U.S. healthcare spend, ~8.5% projected 2026 medical cost trend & 102 health-tech M&A deals in 1H25 to strengthen the deal team's investment thesis
 - Built banker-style planning snapshot evaluating Omada's ~20M covered lives against a ~154M commercially insured TAM and ~27% projected 3-year revenue CAGR, clarifying market runway, growth profile, and key expansion opportunities across GLP-1
 - Identified 2 core vulnerabilities including unproven GLP-1 partnership monetization and low current penetration while grounding projections in 2026E revenue & EBITDA benchmarks, strengthening the foundation for all future downstream work

Wall Street Internship Academy

Johns Hopkins University Fellow

Baltimore, MD

Oct 2025 – Present

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

CCRM Fertility Clinic

Intern

New York, NY

May 2025 – Jun 2025

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

University of Minnesota

Colorectal Data Analysis Intern

Minneapolis, MN

Jun 2024 – Mar 2025

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

LEADERSHIP & COMMUNITY DEVELOPMENT

The Child Mind Institute

Youth Council Member

New York, NY

Jun 2023 – Jun 2025

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

Stanford Stan-X Fly-Lab Program

Student Researcher

New York, NY

Sep 2023 – Jun 2024

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

The Chapin School

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

New York, NY

Sep 2021 – Jun 2025

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

NON-TECHNICAL SKILLS & INTERESTS

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

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

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

Anika Kumar

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EDUCATION

Columbia University

Bachelor of Arts in Economics and Mathematics

New York, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0 | **ACT:** 36
- **Honors/Awards:** Member of Division I Women's Rowing Team, Treasurer of Crowned Lion Innovative Pictures, Presidential Scholars Program Nominee (Scarsdale High School), Member of Signifer Honor Society (Scarsdale High School)

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

- Delcath Systems — *Oncology Drug-Delivery Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Developed a 3-pillar investment thesis on Delcath Systems, synthesizing clinical data, reimbursement dynamics, and competitive positioning across 5+ industry sources to evaluate growth durability, delivering a client-ready recommendation live to BofA
 - Analyzed 2 major growth catalysts for HEPZATO including trial expansion into metastatic breast and colorectal cancers and rollout across 20+ treatment centers targeting 40 by year-end, framing TAM expansion and adoption to clarify timing rationale
 - Evaluated reimbursement risk tied to 340B pricing adoption, benchmarking margins of 85–87% and modeling sensitivity to a 15% earnings decline while outlining 2 diligence questions on revenue per center + payer exposure, strengthening downside risk

Coffee For Good

Financial Analyst Intern

Greenwich, CT

Dec 2025 – Jan 2026

- Supported CFO in financial planning and budgeting for a \$500K+ nonprofit operation, reconciling Salesforce datasets and transaction records across multiple reporting cycles to improve budget visibility, and strengthen oversight supporting clearer operating decisions
- Analyzed 1,000+ financial and CRM data entries within Salesforce to reconcile discrepancies across donor, expense, and operational datasets, producing structured summaries that improved reporting accuracy & strengthened decision visibility for nonprofit leadership

LEADERSHIP & COMMUNITY DEVELOPMENT

LendingCore Partners

Junior Analyst

New York, NY

Sep 2025 – Present

- Conduct private credit analysis within CU's student-run investment club, supporting financial modeling, borrower credit evaluation & industry research across 10+ opportunities to assess downside risk/strengthen investment judgment in middle-market credit scenarios
- Synthesize core insights from monthly discussions with 12+ private credit, private equity, and investment banking professionals, translating industry perspectives into structured market briefs that deepened understanding of capital structures & credit underwriting

RowAmerica Rye Men's Varsity Rowing Team (#1 Ranked US Youth Team)

Coxswain | Athlete Mentor

Rye, NY

Feb 2022 – Jun 2025

- Led race strategy and in-boat decision making for the #1 ranked U.S. youth rowing program, coordinating stroke sequencing and race pacing during national championship competition while synthesizing 1,000+ hours of ergometer and technical data to elevate team
- Engineered technical improvements through real-time feedback and post-race performance analysis using 1,000+ ergometer data points while mentoring 10+ new athletes on race mindset, communication discipline, and technical fundamentals, strengthening team

The Sharing Shelf

Teen Board Member | Fashion Consultant | Lead Intern

Port Chester, NY

Sep 2023 – Aug 2025

- Coordinated logistics and distribution of 650+ clothing and hygiene kits for underserved youth, collaborating with nonprofit leadership and volunteers to streamline donation intake and strengthen operational execution across community outreach programs
- Led social media analytics and campaign planning for seasonal donation drives while orchestrating collection and distribution of 300+ prom dresses, expanding community participation and improving access to formalwear for local high school students

Corporate Ethics Club

Co-Founder | Treasurer | Head of Gender Equity Programming

Scarsdale, NY

Jan 2023 – Jun 2025

- Co-founded a corporate ethics organization and co-authored a formal proposal adopted by school administration, launching programming on workplace equity and governance while coordinating 10+ discussions and workshops that grew student engagement
- Directed fundraising and programming initiatives supporting diversity and inclusion partnerships with local corporations, organizing 5+ educational events and interactive debates that strengthened awareness of gender equity challenges in the modern workplace

Improving India Together

Co-Founder | Co-President | Lead Tutor

Scarsdale, NY

Jan 2021 – Jun 2025

- Co-led an international tutoring initiative supporting 50+ under-resourced students in India while raising \$10K+ for educational access, coordinating volunteer tutors and academic programming that improved comprehension in elementary math, science + English

NON-TECHNICAL SKILLS & INTERESTS

Skills: Rowing, Google Workspace, statistical analysis, social media content creation and marketing, Microsoft Office, team leadership, project management, Canva, public speaking, baking, tutoring, coaching

Languages: English (Native) | Spanish (Conversational) | Hindi (Conversational)

Interests: Logic puzzles, rowing strategy and technique analysis, thrift shopping, coffee making, dog walking, psychology, true crime podcasts, and The Hunger Games series

Celine S. Ebert

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EDUCATION

Johns Hopkins University

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

Baltimore, MD

Expected Graduation: May 2029

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

PROFESSIONAL EXPERIENCE

J&C Capital Firm

Incoming Spring Search Fund Intern

Dallas, TX

Jan 2026 – Present

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

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

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

Institute for Applied Economics

Research Analyst

Baltimore, MD

Nov 2025 – Present

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

BFS Advisory Group

Wealth Management Intern

Dallas, TX

Jun 2025 – Aug 2025

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Johns Hopkins Varsity Volleyball Team

NCAA Varsity Athlete, Starting Right Side Hitter

Baltimore, MD

Sep 2025 – Present

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

Student Consulting for Nonprofit Organizations Team

Student Consultant

Baltimore, MD

Sep 2025 – Present

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

Emporio Organization

Founder, CEO

Dallas, TX

Jun 2021 – Present

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

The Hockaday School Investment Firm

Chief Executive Officer

Dallas, TX

Aug 2022 – May 2025

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

NON-TECHNICAL SKILLS & INTERESTS

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

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

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

Connor J. Simkiss

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EDUCATION

Tufts University

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

Medford, MA

Expected Graduation: June 2029

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

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

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

Francisco's on the River

Server, Busser, Host (Seasonal)

Washington Crossing, PA

Nov 2022 – Present

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

Simkiss Services

Co-Owner & Operator

Furlong, PA

Nov 2020 – Aug 2025

- Founded and scaled a residential power washing and landscaping business, managing sales, pricing, scheduling, and service execution to acquire 100+ clients and generate \$40K+ in revenue through disciplined cost control and repeat-customer retention
- Designed targeted outreach and referral strategies to expand local market penetration, optimizing route density, job sequencing, and equipment utilization to improve margin per job and sustain steady year-over-year growth in a competitive services market

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Tufts Varsity Football

NCAA D-III Student-Athlete, Linebacker

Medford, MA

Sep 2025 – Present

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

Big Brothers Big Sisters of Eastern Massachusetts

Big Brother & Youth Mentor, Somerville Neighborhood School

Somerville, MA

Sep 2025 – Present

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

United States Army ROTC

MS1 Cadet and Scholarship Recipient

Cambridge, MA

Aug 2025 – Present

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

ADDITIONAL SKILLS & INTERESTS

Skills: Microsoft Excel, Microsoft Power point, Microsoft Word, Leadership, Collaboration, Critical thinking

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

Connor J. Wilkes

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EDUCATION

Johns Hopkins University | KSAS
Bachelor of Arts in Economics | Accounting and Financial Management, Applied Mathematics and Statistics

- Cumulative GPA:** 3.86/4.0
- Honors/Awards:** NCAA Division III Student-Athlete (JHU Men's Soccer), Certificate in Bloomberg Market Concepts
- Relevant Courses:** Calculus III, Elements of Microeconomics + Macroeconomics, Applied Economics, Financial Accounting

Baltimore, MD
Expected Graduation: May 2029

PROFESSIONAL EXPERIENCE

Bank of America
MAP Investment Banking Fellow
Selected Transaction Experience

- Delcath Systems — *Oncology Drug-Delivery Platform (Healthcare Advisory | Capital Markets & Strategic Advisory Simulation)*
 - Ranked in the top 12% (75/654) of a national investment banking fellowship for NCAA athletes, analyzing 5–7 emerging healthcare companies while building fictional 3-statement projections & valuation frameworks that strengthened strategic clarity
 - Led Monitoring Phase synthesis analyzing 128% YoY revenue growth, 86% gross margins, and 2.8x EV/Revenue valuation for Delcath, framing adoption upside for FDA-approved HEPZATO within an ~11% CAGR precision oncology market for thesis
 - Evaluated 8–12 high-growth healthcare companies through competitive landscape scans, KPI benchmarking, and multi-scenario modeling across revenue, margin, and adoption drivers, strengthening strategic-fit assessments & downside framing for the team
 - Synthesized 10+ project deliverables across six MAP phases into a Bank-of-America-style pitch deck and one-page fact sheet, aligning assumptions, refining financial narratives, and translating technical analysis into clear messaging under a 5-week deadline

Remote
Jan 2026 – Present

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

- Support Professor Steve Hanke (former senior economic advisor to President Reagan) through 10+ hours/week of macroeconomic research, evaluating global financial markets, inflation trends & currency dynamics to inform publications/media/public policy analysis
- Produce daily market commentary and data-driven insights for a high-visibility Twitter audience of 800K+ followers, translating complex macroeconomic developments into concise analysis supporting Professor Hanke's public economic commentary and research

Baltimore, MD
Jan 2026 – Present

USSF/OHSAA Soccer
Soccer Referee

- Officiated state and national-level matches as a registered USSF/OHSAA referee, applying real-time rule interpretation and positioning to ensure fair play while managing high-pressure environments and maintaining match control across competitive leagues
- Exercised rapid decision-making and conflict de-escalation during live matches, communicating rulings clearly with 20+ players, coaches, and spectators per match to maintain authority, safety, and sportsmanship in fast-paced competitive league and tournament

Cincinnati, OH
May 2023 – Aug 2025

Fifty West Brewing Company
Host

- Delivered high-quality service in a high-volume hospitality environment, managing 50+ customer orders per shift, coordinating with kitchen staff, and maintaining operational efficiency during peak service periods while ensuring accurate orders and consistent service
- Strengthened customer relationships by providing attentive service and resolving 10+ guest requests per shift in real time, contributing to an elevated guest experience and reinforcing the company's reputation for quality hospitality and community engagement

Cincinnati, OH
Jul 2024 – May 2025

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Johns Hopkins Varsity Men's Soccer
NCAA Division III Student-Athlete

- Compete as an NCAA Division III student-athlete, balancing a full academic course load while contributing to team preparation, match execution, and competitive performance within a nationally competitive collegiate soccer program through a rigorous season
- Manage 20+ hours/week of training, travel, and competition, demonstrating discipline, time management, and the ability to execute tactical game plans in high-pressure match environments alongside teammates and coaching staff across conference & postseason play

Baltimore, MD
Sep 2025 – Present

Wall Street Internship Academy
Finance Fellow

- Develop technical foundations in financial accounting, valuation, and corporate finance, completing structured training in financial statement analysis and investment fundamentals to prepare for competitive IB internship recruiting through 20+ hours of coursework
- Participate in 5+ site visits with leading financial institutions, engaging with industry professionals to understand business operations, career pathways in banking/markets/wealth & practical applications of financial analysis across investment banking and markets roles

Baltimore, MD
Sep 2025 – Present

NON-TECHNICAL SKILLS & INTERESTS

Languages: English (Native/Fluent), Spanish (Intermediate Proficiency)
Skills: Data Analysis, Research, Market Analysis, Teamwork, Leadership
Activities & Interests: Athletics, Geopolitics, Cooking, Poker
Certificates: Bloomberg Market Concepts

Eric von Albertini Mason

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EDUCATION

Brown University

Sc.B. in Design Engineering | Minor in Entrepreneurship

Providence, RI

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0 | **ACT:** 34
- **Honors/Awards:** NCAA Division 1 Student-Athlete (Men's Crew), Eagle Scout, Recipient of Special Congressional Recognition for Eagle Scout Project, Youth National Champion (Crew), 2025, ISR NROTC-Scholarship (United States Navy, 1 of 100)
- **Relevant Courses:** Mgmt. of Industrial & Non-Profit Organizations, Multivariable Calculus, Equilibrium Rate and Structure

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

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

RowAmerica Rye

Varsity Boys Rowing Coach

Rye, NY

Sep 2024 – Sep 2025

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

Gericke Group

Intern

Regensdorf, Switzerland

Aug 2024 – Sep 2024

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

Larchmont Manor Beach

Red Cross Certified Lifeguard (Seasonal)

Larchmont, NY

Jun 2022 – Sep 2023

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Brown Men's Crew

NCAA Division 1 Student-Athlete

Providence, RI

Aug 2025 – Present

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

Boy Scouts of America

Eagle Scout

Larchmont, NY

May 2024 – Present

- Led Eagle Scout service project restoring Monarch butterfly habitat by coordinating with 3+ government and environmental organizations, constructing pollinator planter infrastructure & contributing 150+ personal service hours within a 300+ hour project
- Served in troop leadership roles including Troop Guide, mentoring 10+ new scouts and tracking advancement progress through structured planning tools, helping achieve 100% advancement to Tenderfoot rank for new members, a troop first

RowAmerica Rye

Varsity Oarsman

Rye, NY

Sep 2022 – Jun 2025

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

NON-TECHNICAL SKILLS & INTERESTS

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

Ethan C. Friesel

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EDUCATION

Johns Hopkins University | KSAS, WSE

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

Baltimore, MD

Expected Graduation: June 2029

- **Cumulative GPA:** 4.0/4.0 | **ACT:** 35
- **Honors/Awards:** Head of School List, AP Scholar with Distinction, Sociedad Honoraria Hispánica, Duff Tyler Spirit Award
- **Relevant Courses:** Financial Accounting, Elements of Macroeconomics, Elements of Microeconomics, Business Foundations

PROFESSIONAL EXPERIENCE

Searchlight Capital

Incoming Private Equity Summer Analyst

New York, NY

Jun 2026 – Aug 2026

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

Bank of America

MAP Investment Banking Fellow; Team Captain

Remote

Jan 2026 – Present

Selected Transaction Experience

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

Vertical Bridge

Mergers and Acquisitions Summer Intern

Boca Raton, FL

Jun 2025 – Aug 2025

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

12AM Tutoring Services

Student Tutor

Boca Raton, FL

Jun 2023 – Aug 2025

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

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Johns Hopkins University Varsity Football

NCAA Division III Athlete, Defensive End

Baltimore, MD

Aug 2025 – Present

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

Johns Hopkins Institute for Applied Economics

Research Assistant, Economic Intelligence Group

Baltimore, MD

Aug 2025 – Present

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

Johns Hopkins University Student-Athlete Advisory Committee

Team Representative

Baltimore, MD

Aug 2025 – Present

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

Blue Jays for Baltimore

Member

Baltimore, MD

Aug 2025 – Present

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

ADDITIONAL SKILLS & INTERESTS

- Skills: Microsoft Office, Java (Intermediate), Spanish (Intermediate Conversational)
- Certifications: Harvard College Data Science with a Focus on Visualization, Bloomberg Market Concepts
- Interests: Arsenal Soccer, Biking, Coding, Poker, Hiking, Swimming, Traveling, Skiing, San Francisco Sports

Ethan Z. Zhang

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EDUCATION

Columbia University

Bachelor of Arts in Mathematics & Statistics | Minor in Economics

New York, NY

Expected Graduation: May 2029

- **Cumulative GPA:** 3.70/4.0 | **SAT:** 1510
- **Honors/Awards:** USA Swimming Scholastic All-American, AP Scholar with Distinction, National Merit Commended Student
- **Relevant Courses:** Calculus III, Calc-Based Statistics, Intro to Python, Macroeconomics

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

- Option Care Health — *Home Infusion Therapy Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Led Monitoring Phase synthesis for Option Care Health, evaluating portfolio alignment with healthcare trends including aging population demand and Medicare Advantage expansion (54% enrollment), strengthening the client's exposure to new markets
 - Evaluated Option Care's financial profile including \$5.65B LTM revenue, \$5.8–6.0B 2026E revenue, and ~8% EBITDA margins, strengthening team's conviction in scalable healthcare services growth → aging demographics & chronic care demand
 - Synthesized prior phase analysis into a board-level recommendation advising investment in Option Care Health, highlighting industry shifts toward cost-efficient home care + strong demographic tailwinds, strengthening the strategic case for Option Care

Symbal

Growth Intern

New York, NY

Nov 2025 – Present

- Source and engage senior HR and executive leaders at 3,000+ employee enterprises, identifying qualified prospects and initiating outreach that expands Symbal's enterprise sales pipeline & strengthens connections with large corporate buyers across multiple sectors
- Participate in weekly strategy calls with C-suite leaders from organizations including Tesla and Stanford Health, learning enterprise sales frameworks & growth strategy insights from founders while contributing research/preparation for discussions with F500 clients

Sublema

Intern

New York, NY

Nov 2025 – Present

- Facilitate short-term housing placements for college students in NYC by matching tenants with verified sublets, managing 100+ active listings while reducing move-in friction and improving access to reliable housing inventory across multiple neighborhoods and areas
- Manage communications between tenants and hosts, resolving 10+ weekly scheduling, pricing, and lease inquiries while screening requests and maintaining listing accuracy to strengthen match quality and operational efficiency across a fast-moving marketplace

WVC Vortex

Swim Coach

Carmel, IN

Sep 2023 – Jun 2025

- Coached 50+ youth swimmers on stroke mechanics, breathing technique, and competitive starts through structured training sessions, strengthening athlete fundamentals and improving readiness for local swim meets through progressive drills & performance feedback
- Designed personalized training plans and coordinated practice schedules for 20+ competitive swimmers, improving stroke efficiency and race preparation while maintaining safety standards during high-traffic summer swim programs across multiple age groups/levels

LEADERSHIP & COMMUNITY DEVELOPMENT

Columbia University Varsity Swimming

NCAA Division 1 Student-Athlete

New York, NY

Sep 2025 – Present

- Commit 20–25 hours weekly to Division I swim training including practices, lifts, and meet travel while balancing rigorous Ivy League coursework, strengthening time management skills and disciplined execution of key tasks in high-performance collegiate athletics
- Contribute to meet preparation and team culture initiatives/activities during 10+ dual meets and invitationals per season, supporting teammates with technique feedback, strength routines, and time-management strategies that reinforce collective performance goals

Logical Puzzles Club

Co-Founder

Carmel, IN

Jul 2023 – Jul 2025

- Co-founded club hosting weekly puzzle sessions teaching logic, probability, and deductive reasoning frameworks, helping 20+ members strengthen analytical thinking and structured problem-solving skills through collaborative discussion & puzzle breakdowns
- Developed instructional lessons and organized 3+ online puzzle competitions, promoting collaboration and team chemistry while encouraging members to apply systematic reasoning to increasingly complex logic challenges in timed team-based problem-solving

WVC Vortex

Lifeguard

Carmel, IN

Jul 2023 – Jul 2025

- Monitored safety for 100+ swimmers per shift through continuous surveillance and pool deck oversight, maintaining a strong safety record with zero major incidents across multiple summer swim seasons during peak attendance and high-volume training sessions
- Responded to 5+ emergency situations using CPR, AED, and water rescue protocols, ensuring rapid response times and reinforcing safety procedures during high-volume swim practices and competitions in fast-paced competitive aquatic environments

NON-TECHNICAL SKILLS & INTERESTS

Skills and Language(s): Fluent in Mandarin Chinese, Basic Knowledge in E-Commerce

Programs: Python, Microsoft Office | **Interests:** Traveling, Food, Sports, Poker

Gracia R.E. Chua

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EDUCATION

Stanford University

Bachelor of Arts in Economics

Stanford, CA

Expected Graduation: May 2029

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

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

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

Charles R. Blyth Fund

Student Analyst

Stanford, CA

Sep 2025 – Present

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Stanford University, Division I Varsity Squash Team

NCAA Division I Student-Athlete

Stanford, CA

Aug 2025 – Present

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

People's Action Party

Interviewer and Writer at Meet the People Sessions

Singapore

Jan 2022 – Sep 2025

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

Singapore National Squash Association

Athlete, National Team Captain

Singapore

Aug 2016 – Aug 2025

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

Anglo-Chinese School (Independent), Student Council

Chairperson of 2024 ACSplash

Singapore

Mar 2023 – Jun 2024

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

NON-TECHNICAL SKILLS & INTERESTS

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

Interests: Musicals, Organising Treasure Hunts, Neuroscience of Cognition and Neurological Disorders, Public Policy, Paradoxes and Dualities across Disciplines

Grant M. Schroder

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EDUCATION

Harvard University

Bachelor of Arts in Economics

Cambridge, MA

Expected Graduation: May 2029

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

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

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

The I.D. Group, Inc.

Architectural Intern

Downers Grove, IL

Jun 2025 – Aug 2025

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

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

Harvard Men's XC / T&F

NCAA Division 1 Student-Athlete

Cambridge, MA

Aug 2025 – Present

- Compete as a varsity cross country and track athlete at Harvard while balancing a rigorous Economics curriculum (GPA 3.58), contributing as a top-7 freshman runner and competing in all regular-season meets and the NCAA National Championship meet
- Manage 20+ hours per week of training, travel, and competition alongside coursework in economics and statistics, translating data-driven performance analysis and race strategy into consistent team contributions and execution in high-pressure environments

DGN High School Investment Club

Member

Downers Grove, IL

Sep 2021 – Aug 2025

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

Christ Church of Oak Brook

Usher

Oak Brook, IL

Jun 2015 – Jun 2025

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

Ukrainian Humanitarian Aid Fundraising Event

Co-Founder

Downers Grove, IL

Mar 2022 – Jun 2022

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

SKILLS & INTERESTS

- **Languages:** English, primary | Spanish, secondary.
- **Skills:** Top Varsity runner in high school and now at Harvard. I enjoy coaching and mentoring teammates and youth.
- **Interests:** Travel: Deep desire to learn about other cultures and seeing different landscapes. Traveled to 15+ US States (and counting!), Paris 2024 Olympics, England, Canada, Mexico, & Greece. I hope to study in London in the summer of 2026.

Jadon E. Davis

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EDUCATION

Amherst College

Bachelor of Arts in Psychology

Amherst, MA

Expected Graduation: June 2029

- **Cumulative GPA:** 3.60/4.0
- **Honors/Awards:** NCAA Student-Athlete (Football), Magna Cum Laude, AP Scholar, National Honor Society, Football Captain
- **Relevant Coursework:** Cognitive Neuroscience, Social Psychology

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

- Komodo Health — *Healthcare Data & Analytics Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Placed in the top 12% (75/654) of an IB fellowship for NCAA athletes to advance to the BofA case competition & analyze 5–7 emerging healthcare businesses while building fictional 3-statement projections & strengthening valuation clarity for deal work
 - Led Monitoring Phase synthesis across 10+ deliverables spanning six MAP project phases, structuring insights into a Bank-of-America–style pitch deck +1-page fact sheet while refining assumptions/aligning messaging ahead of final presentation
 - Analyzed Komodo Health's platform combining 330M+ patient journeys and ~16M daily clinical encounters with GeneDx genomic data, strengthening the investment case around precision medicine analytics/datasets versus IQVIA and HealthVerity
 - Synthesized 10+ deliverables across six project phases into a BofA–style pitch deck and one-page fact sheet by structuring insights, refining assumptions & aligning messaging, strengthening overall narrative/client-presentation against 5-week deadline

Weis Markets

Commission Sales Associate

La Plata, MD

Feb 2025 – Aug 2025

- Increased department sales by an estimated 15–20% each shift by recommending products, upselling weekly specials, and guiding 60+ customers through choices, strengthening revenue consistency, client engagement, and frontline insight into shopper behavior
- Processed 60+ transactions per shift while maintaining 95% shelf availability and organizing displays across 5–7 aisles, thereby improving operational flow, inventory accuracy, and the reliability of store presentation during peak-traffic hours

Joyful Kidz

Assistant Daycare Provider

White Plains, MD

Jun 2022 – May 2024

- Supervised up to 8 children daily by coordinating learning activities, monitoring safety routines, and supporting behavioral guidance, strengthening structure, attention to detail, and the consistency of a high-engagement, development-focused childcare environment
- Communicated with 10+ parents and staff members weekly while maintaining organized classrooms, executing meal and nap schedules, and reinforcing program rules, improving operational reliability and overall care quality across multiple age groups

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Amherst College Division III Men's Football

Student-Athlete, Wide Receiver

Amherst, MA

Aug 2025 – Present

- Commit 30+ hours/week to meetings, practices, conditioning, film, and games while balancing academics, strengthening discipline, leadership reliability & execution under high-pressure competitive environments across intensely demanding collegiate athletic season
- Collaborate with 40+ teammates during multi-phase training cycles by integrating coach feedback and adjusting route timing, improving communication flow, precision, and overall consistency on a fast-paced DIII roster and throughout a demanding season

Foundations of Finance Club

Active Member

Amherst, MA

Aug 2025 – Present

- Participate in introductory finance workshops and alumni networking sessions across 5–8 topics, developing familiarity with recruiting expectations, professional conduct & foundational concepts relevant to banking/investing pathways within competitive environments
- Engage in peer-led case prep and career discussions weekly, improving clarity around internship pipelines, industry roles, and the structured reasoning needed for early-stage finance recruiting within an increasingly competitive undergraduate talent landscape

Amherst College Investment Club

Active Member

Amherst, MA

Aug 2025 – Present

- Participate in weekly meetings and stock-pitch debates that inform a \$210K long-only U.S. equity portfolio tied to a \$3.5B endowment, strengthening investment judgment, thesis construction, and analytical clarity in a real-capital, performance-driven environment
- Support idea generation and portfolio discussions by evaluating 3–5 companies per cycle and benchmarking financial drivers against peers, improving valuation reasoning, market awareness, and the quality of conviction-based recommendations

SKILLS & INTERESTS

Skills: Word, PowerPoint, Spanish (limited working proficiency)

Personal Interests: Youth sports, Amateur chess player, Video game development

Jason I. Bae

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EDUCATION

University of Notre Dame

Bachelor of Business Administration in Finance

Notre Dame, IN

Expected Graduation: May 2029

- **Cumulative GPA:** 3.70/4.0 | **SAT:** 1410
- **Honors/Awards:** NCAA D1 Student-Athlete (Men's Fencing), Recipient of the Finance Book Award (Wellesley High School)
- **Relevant Courses:** Foundations of Finance, Principles of Microeconomics

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

- Option Care Health — *Home Infusion Therapy Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Led team's financial modeling for Option Care Health, building fictionalized income statement, balance sheet & cash flow projections across a 5-year horizon while incorporating healthcare demand/cost assumptions to strengthen investment thesis
 - Constructed valuation framework benchmarking Option Care against 3 precedent healthcare transactions including Optum-LHC (\$5.4B) and CVS-Signify (\$8B), analyzing EV/Revenue and EV/EBITDA multiples to strategically place Option
 - Performed sensitivity analysis across 3 key drivers including reimbursement rates, operating margins, and growth assumptions while evaluating execution and industry risks, strengthening downside visibility and supporting disciplined decision making

The Fencer's Playbook

Co-Founder

Remote

Aug 2024 – Present

- Founded a youth fencing coaching platform enabling athletes to submit training videos for personalized feedback and development plans, building an e-commerce service supporting athlete progression while expanding a growing client base of 10+ youth competitors
- Advise 10+ student-athletes and parents through group consulting on fencing recruitment, academic planning, and training strategy, helping families navigate competitive pathways while strengthening overall athlete readiness for collegiate opportunities and beyond

Belmont Day School

Youth Developer & Instructor

Belmont, MA

Dec 2024 – Feb 2025

- Developed a middle school fencing team of 10 students by teaching foundational techniques, footwork, and bout strategy while emphasizing teamwork, communication, and sportsmanship, fostering a positive learning environment and strengthening confidence
- Managed team operations across 10 competitive meets by coordinating schedules with 5 partner schools, organizing certified referees for home events & overseeing match-day logistics, ensuring efficient competitions and a well-structured experience for student-athletes

LEADERSHIP & COMMUNITY DEVELOPMENT

Notre Dame Wall Street Club

Member

Notre Dame, IN

Aug 2025 – Present

- Attend student-led finance panels and networking events with professionals across investment banking, private equity, and asset management, gaining exposure to financial services career paths while strengthening industry awareness and technical knowledge
- Engage with club programming and peer discussions on markets and financial careers, learning from 10+ speaker sessions and alumni perspectives to better understand recruiting pathways and professional expectations across Wall Street roles within finance recruiting

Notre Dame Varsity Fencing

NCAA Division 1 Student-Athlete

Notre Dame, IN

Aug 2025 – Present

- Compete as a Division I varsity fencer while managing a rigorous academic schedule, dedicating 20+ hours per week to practices, conditioning, film review, and national travel for collegiate competitions, strengthening discipline and performance under pressure
- Develop teamwork and communication through daily training and competition, incorporating real-time feedback from coaches and teammates to refine technique, tactical decision-making, and execution while contributing to shared team performance goals

USA Fencing

National Team Athlete & Certified Referee

Boston, MA

Sep 2023 – Present

- Compete as a Cadet and Junior Men's Saber fencer with Team USA, reaching a top-5 national ranking while balancing a rigorous student-athlete schedule and training alongside elite athletes in national and international competitions across the global fencing circuit
- Serve as a certified referee officiating saber, foil, and épée bouts across 16 local and 6 regional USA Fencing tournaments while traveling to 5+ countries for competition, demonstrating rule expertise, leadership, and professionalism in competitive environments

Boston Fencing Club

Youth Assistant Coach of Youth Development

Boston, MA

Sep 2024 – Aug 2025

- Coached weekly youth fencing classes totaling 6 hours per week for 20 athletes, demonstrating techniques and supervising drills to create a safe, structured learning environment that strengthened fundamentals, discipline, and confidence during competitive sessions
- Provided individualized private instruction and real-time feedback to youth fencers on footwork, blade work, and bout strategy, helping athletes accelerate skill development and improve competitive readiness across club practices and tournaments

NON-TECHNICAL SKILLS & INTERESTS

Skills/Languages: English (Native), Korean (Professional Working), German (Elementary)

Interests: Sports, Baking, Traveling, Foodie

Joachim R. Johnson

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EDUCATION

Harvard University

Bachelor of Arts in Applied Mathematics in Economics

Cambridge, MA

Expected Graduation: June 2029

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

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow; Team Captain

Remote

Jan 2026 – Present

Selected Transaction Experience

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

Harvard Athletics

Event Staff Member

Cambridge, MA

Sep 2025 – Present

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

Excel at Episcopal Academy

Summer Camp Counselor

Newtown Square, PA

Jun 2024 – Aug 2025

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

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Harvard Men's Track & Field

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

Cambridge, MA

Sep 2025 – Present

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

Harvard Black Men's Forum

Member

Cambridge, MA

Sep 2025 – Present

- Participate in weekly BMF programming focused on identity, leadership, and community development while contributing to 5+ dialogue-based events, strengthening cultural awareness, peer connection, and reflective personal growth
- Mentor middle-school boys through the David Walker Scholars program by leading discussions on identity, confidence, and belonging across 10+ sessions, improving youth engagement and supporting consistent personal-development outcomes

Independent Study on Track & Field Biomechanics

Researcher & Content Creator

Newtown Square, PA

Sep 2024 – Present

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

Episcopal Academy Varsity Track & Field

Captain; High Jumper & Triple Jumper

Newtown Square, PA

Mar 2022 – Jun 2025

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

ADDITIONAL SKILLS & INTERESTS

- Skills: Microsoft Excel, Microsoft Word, Google Workspace | Languages: English (Primary), Spanish (Intermediate)
- Interests: Stock and Futures Trading, Mentorship/Youth Development, Formula 1, NFL, NBA, Track, Biomechanics

Julia Lewkowitz

julew@uchicago.edu | +1 (305) 815-1119 | [Linkedin Profile](#)

EDUCATION

University of Chicago

Bachelor of Arts in Economics

Chicago, IL

Expected Graduation: June 2029

- **Cumulative GPA:** 3.86/4.0
- **Honors/Awards:** Student-Athlete (Women's Volleyball), Mu Alpha Theta Honors Society, Science and Spanish Honors Society
- **Organizations:** Women in Economics, Business Organization for Latino Development; Board member: Smart Woman Securities

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow; Team Captain

Remote

Jan 2026 – Present

Selected Transaction Experience

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

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

Co-founder & Manager

Remote

Jun 2020 – Aug 2025

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

Ransom Everglades Annual Business Challenge

Competition Finalist

Miami, FL

Nov 2023 – Mar 2024

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

Key Biscayne Island Volleyball

Paid Assistant Volleyball Coach

Key Biscayne, FL

Aug 2021 – Mar 2024

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

LEADERSHIP & PROFESSIONAL DEVELOPMENT

University of Chicago Varsity Volleyball Team

Student-Athlete

Chicago, IL

Sep 2025 – Present

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

Ransom Everglades School Ambassador

Student Ambassador

Miami, FL

Aug 2022 – May 2025

- Represented the senior class by speaking on panels for 100+ families and leading 30+ campus tours during admissions events, synthesizing academic and student-life insights to strengthen prospective-family engagement, clarity of information, and connection

Ransom Everglades High School Varsity Volleyball

Team Captain & Student Athlete

Miami, FL

Jul 2021 – Nov 2024

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

ADDITIONAL SKILLS & INTERESTS

- Trilingual: English, Portuguese, and Spanish
- Interests: Listening to podcasts, running, reading, traveling and visiting new places

Kate I. Ambrose

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EDUCATION

Lafayette College

Bachelor of Arts in Economics

Easton, PA

Expected Graduation: June 2029

- **Cumulative GPA:** 3.75/4.0
- **Honors/Awards:** NCAA Division 1 Student-Athlete (Field Hockey)

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

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

Lang Development Group

Commercial Real Estate Development Intern

Newark, DE

Dec 2025 – Jan 2026

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

Buffalo Wild Wings

Hospitality Assistant

Newark, DE

Feb 2025 – May 2025

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Lafayette College's Women's Varsity Field Hockey

NCAA Division 1 Student-Athlete

Easton, PA

Aug 2025 – Present

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

B+ (Be Positive) Foundation (Student Chapter)

President

Newark, DE

Sep 2024 – Jun 2025

- Directed 12-month fundraising strategy as chapter president, leading executive meetings, coordinating 30+ volunteers, and raising \$48,000+ through structured event execution and budget oversight to support families impacted by pediatric cancer
- Managed end-to-end event P&L across multiple initiatives, overseeing budgeting, vendor coordination, and post-event ROI analysis to optimize capital deployment and improve engagement yield across student and community stakeholders

Newark Charter High School & Delaware Sharks Club

Captain, Varsity Field Hockey Team

Newark, DE

Aug 2024 – Nov 2025

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

National French Honors Society, Newark Charter School

Leader/Secretary

Newark, DE

Sep 2024 – May 2025

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

NON-TECHNICAL SKILLS & INTERESTS

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

Katherine E. McMullen

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EDUCATION

University of California, Berkeley

Bachelor of Arts in Economics

Berkeley, CA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.87/4.0
- **Honors/Awards:** NCAA D1 Student-Athlete (Women's Lacrosse), Dale Lacky and Clark Coover Memorial Scholarship Winner (2025), USA Lacrosse High School All-American (2025), Davis High School Graduation Student Speaker (2025), California State Seal of Bilingualism in French (2025), AP Scholar with Distinction (2025), Davis High School Athlete of the Year (2024-2025)
- **Relevant Courses:** Econ 2, Math 16B, BUS 101, intent to study abroad at the London School of Economics (Summer 2026)

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

- Option Care Health — *Home Infusion Therapy Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Created the investment thesis for Option Care Health, analyzing the shift toward lower-cost outpatient and home infusion settings across Medicare and commercial payers, evaluating a national platform serving 285K+ patients across 170+ location
 - Analyzed healthcare spending trends including specialty medicines representing ~55% of U.S. drug spending and rising demand for outpatient infusion services, positioning Option Care within a fragmented national market to identify 5+ expansion drivers
 - Evaluated reimbursement risk tied to Medicare and government payer structures while outlining diligence questions on strategic portfolio fit and 5–10 year exit pathways, strengthening downside visibility and investment decision readiness within healthcare

NorCal RIZE Lacrosse Club

Coach & Instructor

Sacramento, CA

Jun 2025 – Aug 2025

- Designed and led twice-weekly practices for youth and JV teams of 20 athletes, delivering 2-hour structured sessions focused on fundamentals, lacrosse IQ, and situational decision-making, strengthening individual development and overall team competitiveness
- Mentor athletes through accountability-driven coaching and real-time feedback during practices and games, reinforcing communication, resilience, and disciplined execution while helping build a positive team culture across two seasonal lacrosse programs

Northern California Women's Lacrosse Officials

Certified Referee

Davis, CA

Feb 2024 – Aug 2025

- Certified and annually recertified to officiate youth and high school women's lacrosse, applying updated rules, positioning mechanics, and safety protocols to manage competitive games while ensuring consistent enforcement of league standards
- Officiated 20+ games and tournaments, making decisive real-time calls on fouls, possession, and gameplay violations while maintaining sideline control, ensuring player safety and fair competition across youth and high school matchups

The Tenacity Project

Program Leader & Staff Writer

Davis, CA

Mar 2023 – Jul 2024

- Directed a four-day youth athletics camp for 40 participants by hiring staff, managing equipment logistics, and designing a structured curriculum tailored to age, skill level, and safety standards, strengthening athlete engagement and program execution
- Researched and interviewed 5 alumni across time zones and career stages to produce mission-aligned written features, publishing 3 articles that highlighted athlete journeys and strengthened storytelling supporting the organization's community outreach efforts

LEADERSHIP & COMMUNITY DEVELOPMENT

Davis Senior High School

Student Government Leader (ASB Vice President & Friendship Day President)

Davis, CA

Apr 2023 – Jun 2025

- Elected ASB Vice President representing a 2,200-student body while leading governance operations including agenda setting, committee assignments, and conflict resolution, partnering with school administrators to implement ~10 new campus improvements
- Directed schoolwide community-building initiatives by organizing monthly unity events for up to 100 students and coordinating a 700-student senior capstone program, strengthening student engagement and collaboration between students and the administration

Yolo Food Bank

Volunteer

Davis, CA

May 2020 – Aug 2020

- Delivered food to rural and underserved families during COVID-19 and through ongoing monthly outreach, supporting community access to essential nutrition while strengthening the food bank's ability to reach vulnerable populations across multiple rural areas
- Supported weekly distribution operations by packing produce, organizing supplies, and staffing pop-up markets, helping streamline food distribution logistics and expand reliable access to healthy groceries for families across the local community

NON-TECHNICAL SKILLS & INTERESTS

Skills and Language(s): English (Native), French (Intermediate)

Interests/Hobbies: International travel, reading, fitness, professional sports, live music, jigsaw puzzles

Lia R. Nafe

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EDUCATION

Georgetown University
Bachelor of Arts in Economics

Washington, DC

Expected Graduation: June 2029

- **Cumulative GPA:** 4.0/4.0 | **ACT:** 35
- **Honors/Awards:** Student-Athlete (Sailing), National Merit Commended Student, IL State Scholar, AP Scholar with Distinction
- **Relevant Coursework:** Linear Algebra, Multi-Variable Calculus, Microeconomics, Macroeconomics

PROFESSIONAL EXPERIENCE

Bank of America

Remote

MAP Investment Banking Fellow; Team Captain

Jan 2026 – Present

Selected Transaction Experience

- Oak Street Health — *Value-Based Medicare Primary Care (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Led the Initiation Phase as 1/15 captains (~2%) from 654 fellows, directing a 5-person deal team through ~5 research sprints/week to recommend a fast-growth healthcare company, culminating in a live virtual presentation to BofA on 3/23/26
 - Sized U.S. Medicare TAM at ~\$1.03T and Medicare Advantage SAM at ~\$450–500B, then prioritized 3 subsectors (Pharma ~\$600B U.S., Services ~30% of spend, MedTech ~\$800B global) to anchor growth drivers/deal relevance for industry snapshot
 - Built an Oak Street Health screening package by defining SOM as ~33M MA members with <1% penetration, benchmarking 4 peers (ChenMed, CenterWell, One Medical + OSH) and drafting 2 key risks with mitigants, sharpening due diligence priorities

Rem and Company

Washington, DC

Junior Strategist

Sep 2025 – Present

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

Lock Chicago Escape Rooms

Evanston, IL

Game Master

Jul 2023 – Apr 2024

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

University of Illinois Chicago Biotechnology Summer Research

Chicago, IL

Biotechnology Research Volunteer

May 2023 – Aug 2023

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

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

Georgetown University Sailing Team

Washington, DC

NCAA Division 1 Student-Athlete

Aug 2025 – Present

- Train 20+ hrs/week while balancing full academic responsibilities, strengthening discipline, focus, and execution needed to perform consistently across competitive fleet-racing condition; implement race strategies with team under dynamic on-water environments

Loyola Academy

Wilmette, IL

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

Aug 2022 – May 2025

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

Community Service Projects

Evanston, IL

Volunteer

Aug 2021 – May 2025

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

SKILLS & INTERESTS

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

Lore O. Laniyan

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EDUCATION

Yale University

Bachelor of Arts in Economics and Applied Mathematics

New Haven, CT

Expected Graduation: June 2029

- **Cumulative GPA:** 3.90/4.0 | **ACT:** 35
- **Honors/Awards:** Division 1 Student-Athlete (Field Hockey), H. Scott Caven III Memorial Scholarship Award, Cum Laude

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

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

ARA Partners

Intern

Houston, TX

Jun 2025 – Aug 2025

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

Texas Pride Field Hockey Club

Coach

Houston, TX

Feb 2024 – May 2024

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Yale University Varsity Field Hockey Team

NCAA Division 1 Student-Athlete

New Haven, CT

Aug 2025 – Present

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

St. John's School Black Girl's Coalition

President

Houston, TX

Aug 2024 – May 2025

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

Houston Museum of Natural Science

Teen Intern

Houston, TX

Jun 2023 – Jul 2023

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

ADDITIONAL SKILLS & INTERESTS

Skills and Language(s): Spanish, Adobe Photoshop

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

Nicola S. Dadlani

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EDUCATION

Brown University

Bachelor of Arts in Applied Math-Economics

Providence, RI

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0 | **SAT:** 1540
- **Honors/Awards:** NCAA D1 Student-Athlete (Women's Track & Field); First-Year Analyst (Brown Investment Group)
- **Relevant Courses:** Principles of Economics, Management of Industrial & Nonprofit Organizations

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

- HST Pathways — *ASC-Focused Healthcare SaaS Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Led Monitoring Phase synthesis for HST Pathways, evaluating strategic fit within the investor's portfolio by analyzing exposure to the ASC software market growing ~6%/year and highlighting a platform with 80% recurring revenue & 97% client retention
 - Developed board-level memo outlining long-term value creation through expansion into adjacent ambulatory specialties and analytics modules, projecting ~28% revenue CAGR to \$344M by 2030 while identifying strategic SaaS exit pathways in 5–7 years
 - Synthesized financial projections, competitive positioning, and operational drivers into a final investment recommendation highlighting HST's ~40% market share in a two-player vertical, strengthening conviction in scalable software & healthcare cos.

Glenair

Summer Intern

Glendale, CA

Jul 2025 – Aug 2025

- Rotated across 4 departments including Continuous Improvement, Finance, Sales & Marketing, and Engineering to analyze manufacturing workflows and decision-making processes, strengthening understanding of operations inside a manufacturing company
- Synthesized cross-department insights from 10+ operational meetings and shadow sessions to evaluate tradeoffs between cost, efficiency, and product reliability, identifying process improvement opportunities across Glenair's end-to-end manufacturing operations

Perspective-Z Consulting

Founder

Los Angeles, CA

Jun 2022 – Jun 2024

- Founded a Gen-Z focused consulting practice advising 5+ small business clients on brand positioning, digital marketing strategy, and customer engagement, helping businesses-in-need better align messaging and product identity with emerging consumer demographics
- Built Gen-Z marketing frameworks and campaign strategies for 5+ client brands, strengthening digital presence and engagement through targeted messaging and content strategy across key social and online marketing channels to drive measurable audience growth

LEADERSHIP & COMMUNITY DEVELOPMENT

Brown Investment Group

First Year Analyst, Research Committee Member

Providence, RI

Sep 2025 – Present

- Selected as 1 of 10+ first-year analysts within a competitive research committee managing a \$500K student-run investment fund, supporting portfolio research and investment decision-making through financial and sector analysis for active fund allocations
- Conduct sector research across Energy and Natural Resources and presented 1 equity pitch on PG&E (PCG) to 100+ members, applying financial modeling and valuation frameworks to evaluate risk drivers + investment opportunities for investment consideration

Bites of Hope Foundation

Founder

Los Angeles, CA

Jul 2023 – Jul 2025

- Founded a local nonprofit organization delivering monthly nutrition workshops for underserved youth at 3+ local shelters, partnering with organizations such as the Salvation Army to expand access to cooking education & food-based wellness resources in Greater LA
- Led and coordinated 300+ volunteers and student leaders across 4 Los Angeles schools, building a scalable advisory board and partnering with UC Irvine Medical Center to deliver kidney-health nutrition resources to underserved families through 5+ workshops

SLIDE (Student Leaders in Inclusion, Diversity, and Equity)

Co-Chair

Studio City, CA

Aug 2024 – Jun 2025

- Appointed as 1 of 5 senior student leaders to partner with school administration on DEI initiatives, designing programming and outreach strategies that strengthened student engagement and dialogue across the campus community through student-led initiatives
- Coordinated 5+ speaker events and equity initiatives, aligning programming with institutional DEI goals and expanding student participation through structured community discussions and leadership programming across multiple grade-level student groups

Women of Color Club

Senior Leader

Studio City, CA

Aug 2023 – Jun 2025

- Founded and scaled student organization from 0 to 30+ active members within one academic year, mentoring 2 junior leaders to ensure leadership continuity and strengthen long-term club sustainability through structured leadership development and mentorship
- Organized 3+ high-impact speaker programs, including a major campus event featuring Mindy Kaling, driving record attendance and expanding visibility for leadership development and dialogue initiatives across the school community through campus-wide programs

NON-TECHNICAL SKILLS & INTERESTS

Skills and Languages: Proficient in French and Spanish; public speaking; leadership; qualitative research; community organizing

Interests: Culinary experimentation (Founded a student cooking club in HSI), classical piano, travel photography, global cultures

Otis Y. Tsai

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EDUCATION

Carnegie Mellon University

Bachelor of Arts in Business Administration – Concentration in Finance | Minor in Business Analytics

Pittsburgh, PA

Expected Graduation: May 2029

- **Cumulative GPA:** 4.0/4.0
- **Honors/Awards:** NCAA Student-Athlete (Men's Swim & Dive), National Merit Commended Student, AP Scholar with Honors
- **Relevant Courses:** Calculus in I-III, Microeconomics, Regression Analysis

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

- Komodo Health — Healthcare Data & Analytics Platform (Healthcare Advisory | Capital Markets & Strategic Advisory Simulation)
 - Selected to lead the Execution Phase for a national investment banking fellowship for NCAA athletes, advancing to the top 12% (75/654) & preparing final deal recommendation presentation for bankers at Bank of America to be presented on 3/23/26
 - Led deal team's full valuation build for Komodo Health, constructing fictional income statement, balance sheet, and cash flow models with 5-year projections based on 25% CAGR assumptions, informing strategic investment evaluation for a PE client
 - Built valuation framework benchmarking Komodo against Life Sciences SaaS peers including Veeva Systems and IQVIA, applying revenue multiples + 22–28% EBITDA margin proxies to estimate enterprise value/contextualize growth in healthcare
 - Performed sensitivity analysis around 3 key drivers including revenue growth, margin expansion, and data access reliability while evaluating regulatory privacy risks and AI auditability requirements, supporting team's disciplined investment decision making

Rosebowl Aquatics Center

Swim Instructor

Pasadena, CA

Aug 2024 – Jul 2025

- Delivered group swim instruction to 20+ children across varying skill levels, adapting drills and demonstrations to individual abilities while maintaining safety protocols and professional instruction standards in a fast-paced aquatic training environment during lessons
- Assessed swimmer technique and progress through continuous observation and targeted feedback, helping athletes improve stroke mechanics, water confidence, and overall skill development across structured group lessons during multi-level youth training programs
- Managed class organization and safety for youth swimmers during high-volume sessions, maintaining order and attentiveness in a fast-paced environment while ensuring smooth transitions between drills and activities across back-to-back instructional swim blocks

LEADERSHIP & COMMUNITY DEVELOPMENT

Carnegie Mellon Varsity Swim

NCAA Student-Athlete

Pittsburgh, PA

Aug 2025 – Present

- Compete as a varsity swimmer while balancing a full academic schedule and a 30+ hour weekly training commitment across practices, lifts, and meets, strengthening time management, endurance, and disciplined execution in high-performance competitive environments
- Incorporate continuous coaching feedback across 20+ weekly training hours to refine technique and race strategy, aligning individual performance goals with team objectives and contributing to overall program success in high-stakes meet environments
- Perform under competitive pressure during collegiate swim meets and team training cycles, translating preparation and race analysis into consistent performance while maintaining focus and accountability within a demanding Division III team structure

Tepper Finance Group

Member

Pittsburgh, PA

Aug 2025 – Present

- Analyze public companies across the technology sector by reviewing financial statements, industry trends, and competitive positioning, applying structured equity research frameworks to support investment theses and market insights for collaborative club discussions
- Delivered 3 equity pitches on technology companies, presenting financial drivers, industry dynamics, and risk factors while strengthening investment communication and analytical reasoning in a collaborative finance club environment during weekly sessions
- Built basic valuation models including scenario and sensitivity analysis to evaluate upside potential, downside risk, and key assumptions, strengthening financial analysis skills and structured investment decision making for equity pitch preparation and review

Make-A-Play Foundation

Formula 1 Fellow

Remote

Nov 2025 – Jan 2026

- Selected as 1 of 50 NCAA athletes nationwide (10% acceptance rate from 500+ applicants) for a 10-week investment banking fellowship sponsored by Bank of America, completing 10+ weekly assignments across accounting, valuation & financial statements
- Competed in 3 superday-style mock interviews replicating investment banking recruiting intensity, ranking in the top 25% across cohorts and earning "Hire" ratings in every session as 1 of only 10 fellows to achieve consistent positive evaluations from interviewers
- Collaborated with student-athletes from 15+ Division I universities to develop sponsor-evaluated pitch materials while integrating structured evaluator feedback from behavioral and technical assessments to strengthen behavioral and technical interviewing skills

NON-TECHNICAL SKILLS & INTERESTS

Skills: Data analysis, regression modeling, financial analysis | **Languages:** English (Fluent), Mandarin (Conversational)

Interests: Finance, Quantitative analysis, Venture Capital, Statistical reasoning | **Programs:** Excel, Python, R, Google Sheets

Rayna Li

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EDUCATION

Massachusetts Institute of Technology

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

Cambridge, MA

Expected Graduation: May 2029

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

PROFESSIONAL EXPERIENCE

Intel

Incoming Sales Operations Undergraduate Intern

Santa Clara, CA

Jun 2026 – Aug 2026

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

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

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

MIT Department of Political Science

Undergraduate Research Assistant

Cambridge, MA

Jan 2026 – Feb 2026

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

Collins Permian

Summer Intern

Dallas, TX

May 2025 – Aug 2025

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

Dallas Environmental Education Initiative (EEI), City of Dallas, University of North Texas

Research Intern

Dallas, TX

Jun 2024 – Aug 2024

- Selected as 1 of 10 interns from 100+ applicants to conduct research on Dallas water systems, performing spatial and statistical analysis using ArcGIS and R before presenting findings/recommendations to Dallas City Council members for potential integration

LEADERSHIP & COMMUNITY DEVELOPMENT

MIT Varsity Women's Tennis

NCAA Division III Student-Athlete

Cambridge, MA

Sep 2025 – Present

- Compete as a varsity tennis student-athlete while managing 15+ hours of weekly training alongside a rigorous academic schedule; previously ranked Top 20 U.S. high school tennis player by UTR and recipient of the 2025 USTA Outstanding Sportsmanship Award

MIT Society of Women Engineers (SWE)

Campus Representative

Cambridge, MA

Sep 2025 – Present

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

MIT Asian American Association

Internal Social Chair

Cambridge, MA

Sep 2025 – Present

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

ACEing Autism

Court Lead & Social Media Director

McKinney, TX

Jan 2019 – Aug 2025

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

NON-TECHNICAL SKILLS & INTERESTS

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

Languages: English: fluent – Mandarin: fluent | **Programs:** Sigma Kappa Sorority

Siwon Yuon

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EDUCATION

Amherst College

Bachelor of Arts in Political Science

Amherst, MA

Expected Graduation: May 2029

- **Cumulative GPA:** 3.75/4.0 | **ACT:** 33
- **Honors/Awards:** Division III Student-Athlete (Football), AP Scholar with Distinction, Top 5% of High School Class
- **Relevant Coursework:** asSTAT 230 (Intermediate Statistics), ENGL 129 (Literature Seminar), RELI 166 (Religious Studies), FYSE 107 (First-Year Seminar)

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

- HST Pathways — *ASC-Focused Healthcare SaaS Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Led Control Phase investment thesis on HST Pathways, owning 10+ deliverables across 2.5 months while analyzing a duopoly ASC software market with ~40% share/97% retention/65% gross margins, strengthening conviction in durable SaaS cash flows
 - Built financial model projecting 28% CAGR revenue growth to \$344M by 2030 supported by 80% subscription ARR, 3% churn & 20% upsell rates, identifying EBITDA margins near 25% + valuation upside versus 9–12x vertical SaaS transaction multiples
 - Analyzed ASC market expansion driven by ~6% annual procedure growth and 3,400+ uncontracted centers while evaluating TAM saturation risk near 70% penetration by 2030, proposing specialty expansion & analytics modules to extend customer LTV

Amherst College Loeb Center

Meiklejohn Fellow

Amherst, MA

Nov 2025 – Present

- Selected for year-long fellowship supporting first-generation and low-income students, participating in 20+ structured workshops on career strategy, professional communication, and internship preparation, strengthening career readiness and long-term planning
- Collaborate with career advisors, alumni mentors, and peer fellows through guided sessions on professional exploration and goal setting, applying fellowship training to refine application materials and interview preparation while strengthening networking strategy

Stillwater Ponies Football

Youth Coach

Stillwater, MN

Jun 2024 – Oct 2025

- Coached youth offensive linemen through structured drills and individualized feedback during weekly practices and games, developing core blocking techniques, communication, and positional discipline to strengthen offensive line execution throughout the season
- Collaborated with coaching staff to design age-appropriate training sessions and evaluate player development, leading practice segments and reinforcing teamwork principles that improved player confidence and overall team competitiveness

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

Amherst Varsity Football

NCAA Division I Student-Athlete

Amherst, MA

Aug 2025 – Present

- Compete as a varsity football student-athlete at Amherst while maintaining a 3.75 GPA, contributing to team preparation and execution across a competitive conference schedule while strengthening leadership, discipline, and performance under intense pressure
- Manage 20+ hours per week of training, film study, travel, and competition alongside academic coursework, applying structured preparation and data-driven performance analysis to improve positional execution and support team success throughout the season

Basic Institute for Zonal African Advancement

Co-President

Stillwater, MN

Apr 2024 – Apr 2025

- Led student organization initiatives supporting educational sponsorship programs in Nigeria by coordinating fundraising campaigns, awareness events, and outreach efforts that expanded engagement and strengthened the organization's community impact
- Managed executive planning, member coordination, and event logistics for 10+ club initiatives, aligning programming with BIZAA's mission while strengthening organizational operations and sustaining student participation across the academic year

Stillwater Ponies Football

Team Captain

Stillwater, MN

Dec 2023 – Dec 2024

- Led varsity teammates through practice preparation, communication, and in-game adjustments across a full conference schedule, reinforcing discipline and accountability while strengthening team cohesion and competitive performance during the season
- Mentored 15+ younger players on positional fundamentals, preparation habits, and leadership standards while coordinating with coaches on training priorities, helping build a culture of accountability and sustained player development across the program

SKILLS & INTERESTS

- **Languages:** English (Fluent), Korean (Fluent), Spanish (Conversational)
- **Skills:** Communication, Public Speaking, Teamwork
- **Programs:** R, Google Workspace, Canva
- **Interests:** Weightlifting, American History, Cooking, Video Games

Sunnie H. Wang

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EDUCATION

Brown University

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

Providence, RI

Expected Graduation: June 2029

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

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

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

Hope Street Capital

Search Fund Intern

Providence, RI

Sep 2025 – Dec 2025

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

State National Companies (Markel Inc.)

Business Development Intern

Dallas, TX

Jun 2025 – Aug 2025

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

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

Brown Women's Lacrosse

NCAA Division 1 Student-Athlete

Providence, RI

Aug 2025 – Present

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

DearPiggy | [Youtube Channel](#)

Founder

Dallas, TX

Mar 2020 – Aug 2025

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

Hockaday Upper School Student Council

Executive President & Executive Financial Officer/Parliamentarian

Dallas, TX

Aug 2021 – May 2025

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

SKILLS & INTERESTS

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

Trenton C. Cassens

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EDUCATION

Emory University

Bachelor of Business Administration, Bachelor of Arts in Economics

Atlanta, GA

Expected Graduation: May 2029

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

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow

Remote

Jan 2026 – Present

Selected Transaction Experience

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

Eagle Swim Club (ESC)

Assistant Coach

Atlanta, GA

Aug 2025 – Present

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

Klein Coding Academy

Course Instructor

Houston, TX

Jun 2023 – Jul 2025

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

PACK Special Olympics

Assistant Coach

Houston, TX

Jun 2022 – Jul 2025

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Emory University Swimming & Diving

Varsity Swimmer

Atlanta, GA

Sep 2025 – Present

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

Emory Student Alumni Board

Board Relations Member

Atlanta, GA

Sep 2025 – Present

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

Matriculate

Advising Fellow

Atlanta, GA

Sep 2025 – Present

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

NON-TECHNICAL SKILLS & INTERESTS

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

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

Victoria X. Gao

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EDUCATION

Columbia University

Bachelor of Arts in Financial Economics

New York, NY

Expected Graduation: June 2029

- **Cumulative GPA:** 3.85/4.0 | **SAT:** 1550
- **Honors/Awards:** NCAA Division 1 Student-Athlete (Women's Volleyball), 2025-26 Dean's List
- **Relevant Coursework:** Intermediate Macroeconomics, Principles of Economics, Calculus III, Calculus-Based Intro to Statistics

PROFESSIONAL EXPERIENCE

Bank of America

MAP Investment Banking Fellow; Team Captain

Remote

Jan 2026 – Present

Selected Transaction Experience

- Delcath Systems — *Oncology Drug-Delivery Platform (Healthcare Advisory / Capital Markets & Strategic Advisory Simulation)*
 - Led Initiation Phase as 1/15 captains (~2%) from 654 fellows, directing a 5-person deal team through ~5 research sprints/week to recommend Delcath Systems as a strategic acquisition, culminating in a live virtual presentation to BofA bankers on 3/23/26
 - Developed a macro healthcare landscape assessment referencing ~\$9.0T global TAM (2024–2025) and ~\$8.9T serviceable market, prioritizing Pharmaceuticals (7.4% share)/Medical Devices (2M+ device categories) to contextualize Delcath's promise
 - Constructed a company-level investment profile analyzing Delcath's HEPZATO KIT platform, 76-employee footprint, and competitive positioning against ~5 key industry peers (Keytruda, Opdivo/Yervoy, and Sorafenib) to inform diligence priorities

Lionsbridge Financial Fellowship

Columbia University Center for Career Education Fellow

New York, NY

Nov 2025 – Dec 2025

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

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

Columbia Women's Volleyball

NCAA Division 1 Student-Athlete

New York, NY

Aug 2025 – Present

- Dedicate 30+ hrs/week to practices, lifts, travel, film, and team meetings while maintaining Dean's List coursework, strengthening endurance, reliability, and execution under sustained pressure to support consistent performance across competitive cycles
- Started every match as a freshman by preparing through scouting, recovery routines, and 20+ weekly touchpoints with coaches and teammates, enhancing adaptability, situational awareness, and on-court decision-making in fast-changing environments

SIVBC/WVBA

Club Volleyball Captain

Bellevue, WA

Nov 2021 – Apr 2025

- Captained elite club teams for 6 years by directing weekly team sessions, coordinating strategy with coaches monthly, and supporting 10–14 athletes, contributing to two third-place national finishes and strengthening composure in high-performance settings
- Oversaw practice flow, communication standards, and performance expectations while meeting regularly with coaches to refine priorities, enhancing group cohesion, accountability, and the clarity needed to sustain competitive momentum

Hunger Intervention Program

Volunteer

Lake City, WA

Jan 2017 – Apr 2025

- Volunteered 3–9 hrs/week across 8 years preparing meals and youth food packs for two school districts, supporting thousands of distributions and strengthening reliability, attention to detail, and steady performance across shifting community needs
- Collaborated weekly with 5–10 rotating adults to execute meal-production tasks and maintained output quality, improving adaptability, teamwork, and operational consistency in environments requiring steady coordination and predictable execution

Lakeside School

Varsity Volleyball Captain & Spirit Club Founder

Seattle, WA

Aug 2021 – Nov 2024

- Led a 14-player varsity team as a two-year captain and four-year starter while founding Spirit Club for a 600-student community, coordinating weekly meetings and coach touchpoints to strengthen cohesion, shared standards, and day-to-day performance culture
- Directed practices, leadership sessions, and school-wide engagement initiatives by collaborating with coaches, administrators, and student leaders across 10+ planning cycles, enhancing communication flow, participation, and the consistency of community impact

SKILLS & INTERESTS

- **Skills and Language(s):** English (Fluent), Chinese - Mandarin (Fluent), Spanish (Intermediate; 8 years of study)
- **Programs:** Microsoft Excel, PowerPoint
- **Interests:** Watching sports (especially football), spending time with friends and family, traveling, trying new activities, meeting and connecting with new people