

# 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

# 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

# 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

### VWC 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

### VWC 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

# Grant M. Schroder

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## EDUCATION

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### Harvard University

*Bachelor of Arts in Economics*

Cambridge, MA

*Expected Graduation: May 2029*

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

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## PROFESSIONAL EXPERIENCE

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### 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

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Harvard Men's XC / T&F

*NCAA Division 1 Student-Athlete*

Cambridge, MA

*Aug 2025 – Present*

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

### DGN High School Investment Club

*Member*

Downers Grove, IL

*Sep 2021 – Aug 2025*

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

### Christ Church of Oak Brook

*Usber*

Oak Brook, IL

*Jun 2015 – Jun 2025*

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

### Ukrainian Humanitarian Aid Fundraising Event

*Co-Founder*

Downers Grove, IL

*Mar 2022 – Jun 2022*

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

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## SKILLS & INTERESTS

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

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### 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

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### Bank of America

*MAP Investment Banking Fellow*

**Remote**

*Jan 2026 – Present*

#### Selected Transaction Experience

- Confidential Emerging Healthcare Company — *To Be Selected (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
  - Evaluate 8–12 high-growth healthcare companies through competitive scans, KPI benchmarking, and scenario modeling across multiple operating levers, improving strategic-fit assessments, risk-mitigant framing & overall investment-thesis quality for team
  - Synthesize 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

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### 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

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- 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 I 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

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## 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

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### 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

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## PROFESSIONAL EXPERIENCE

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### Bank of America

*MAP Investment Banking Fellow; Team Captain*

Remote

*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

*Junior Strategist*

Washington, DC

*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

*Game Master*

Evanston, IL

*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

*Biotechnology Research Volunteer*

Chicago, IL

*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

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Georgetown University Sailing Team

*NCAA Division 1 Student-Athlete*

Washington, DC

*Aug 2025 – Present*

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

### Loyola Academy

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

Wilmette, IL

*Aug 2022 – May 2025*

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

### Community Service Projects

*Volunteer*

Evanston, IL

*Aug 2021 – May 2025*

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

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## SKILLS & INTERESTS

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

# Lore O. Laniyan

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## EDUCATION

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### 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

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### 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

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### 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

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

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

### Bank of America

*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

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### 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)

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## PROFESSIONAL EXPERIENCE

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### Bank of America

*MAP Investment Banking Fellow*

Selected Transaction Experience

Remote

*Jan 2026 – Present*

- 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

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Amherst Varsity Football

*NCAA Division 1 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

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## SKILLS & INTERESTS

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- **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

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### Brown University

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

Providence, RI

*Expected Graduation: June 2029*

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

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## PROFESSIONAL EXPERIENCE

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### 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

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Brown Women's Lacrosse

*NCAA Division 1 Student-Athlete*

Providence, RI

*Aug 2025 – Present*

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

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

*Founder*

Dallas, TX

*Mar 2020 – Aug 2025*

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

### Hockaday Upper School Student Council

*Executive President & Executive Financial Officer/Parliamentarian*

Dallas, TX

*Aug 2021 – May 2025*

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

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## SKILLS & INTERESTS

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

# 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

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### Columbia University

*Bachelor of Arts in Financial Economics*

New York, NY

*Expected Graduation: June 2029*

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

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## PROFESSIONAL EXPERIENCE

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### 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

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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### Columbia Women's Volleyball

*NCAA Division 1 Student-Athlete*

New York, NY

*Aug 2025 – Present*

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

### SIVBC/WVBA

*Club Volleyball Captain*

Bellevue, WA

*Nov 2021 – Apr 2025*

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

### Hunger Intervention Program

*Volunteer*

Lake City, WA

*Jan 2017 – Apr 2025*

- Volunteered 3–9 hrs/week across 8 years preparing meals and youth food packs for two school districts, supporting thousands of distributions and strengthening reliability, attention to detail, and steady performance across shifting community needs
- 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

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## SKILLS & INTERESTS

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- **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