

AMIRA SINGH

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EDUCATION

Harvard University – Cambridge, MA

GPA: 3.81/4.0

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

Anticipated Graduation: May 2025

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

EXPERIENCE

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

08/2022 – Present

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

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

01/2023 – 02/2023

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

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

06/2022 – 07/2022

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

09/2022 – Present

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

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

09/2021 – 01/2023

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

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

04/2020 – 10/2020

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

ANGEL YOU

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EDUCATION

Harvard University – Cambridge, MA

GPA: 3.5/4.0

B.S. in Applied Mathematics and Economics

Anticipated Graduation: May 2025

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

TECHNICAL SKILLS

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

EXPERIENCE

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

12/2022 – 02/2023

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

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

08/2022 – 10/2022

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

Morgan Stanley – *Firmwide Strategy Student Consultant* | Remote

07/2022 – 08/2022

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

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

06/2022 – 07/2022

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

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

03/2022 – 05/2022

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

Tennis Coach – *Self-Employed* | Chantilly, VA

06/2021 – 05/2022

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

LEADERSHIP & SPECIAL ACTIVITIES

Make A Play Foundation (MAP)

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

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

08/2021 – Present

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

ANGELICA SIH

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EDUCATION

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

RELEVANT EXPERIENCE

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

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

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

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

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

LEADERSHIP

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

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

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

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

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

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

ACTIVITIES

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

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

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

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

OTHER CAMPUS INVOLVEMENTS

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

SKILLS & INTERESTS

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

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

ANGELLE DIAMOND

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EDUCATION

Villanova University – Villanova, PA

GPA: 3.6/4.0

B.B.A. in Marketing and Finance

Anticipated Graduation: May 2024

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

TECHNICAL SKILLS

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

EXPERIENCE

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

08/2022 – 10/2022

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

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

05/2022 – 07/2022

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

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

03/2022 – 05/2022

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

LEADERSHIP & SPECIAL ACTIVITIES

Deloitte US – MAP Entrepreneurial Leaders Participant

06/2022 – Present

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

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

03/2022 – Present

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

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

03/2022 – Present

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

Villanova University Volleyball Team – NCAA Division I Student-Athlete

08/2020 – Present

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

Oliver Wyman – MAP Consulting Summer League Participant

06/2022 – 08/2022

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

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

05/2022 – 05/2022

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

Arctos Sports Partners – MAP Careers in Private Equity Participant

05/2022 – 05/2022

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

ANISHA KUNDU

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EDUCATION

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

GPA: 3.85/4.0

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

Anticipated Graduation: May 2025

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

Gabelli Presidential Scholars Program – Chestnut Hill, MA

GPSP Class of 2025

Anticipated Graduation: May 2025

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

TECHNICAL SKILLS

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

EXPERIENCE

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

06/2023 – 08/2023

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

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

12/2022 – 02/2023

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

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

09/2022 – 11/2022

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

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

06/2022 – 08/2022

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

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

06/2020 – 08/2021

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

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

01/2020 – 03/2020

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

LEADERSHIP & SPECIAL ACTIVITIES

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

09/2022 – Present

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

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

09/2022 – Present

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

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

09/2021 – Present

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

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

10/2022 – 11/2022

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

ANNORA Y. LEE

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EDUCATION

Harvard College – Cambridge, MA

GPA: 3.7/4.0

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

Anticipated Graduation: May 2024

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

EXPERIENCE

Deloitte – Risk, Compliance & Advisory Student Consultant | Remote

07/2023 – 08/2023

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

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

09/2021 – Present

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

Zara – Retail Sales Associate | Cambridge, MA

06/2021 – 08/2021

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

06/2023 – Present

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

Harvard College Varsity Fencing – Student Athlete | Cambridge, MA

08/2020 – Present

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

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

09/2021 – 05/2022

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

Harvard College Opera – Alumni Chair | Cambridge, MA

09/2022 – 05/2023

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

NON-TECHNICAL SKILLS & INTERESTS

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

AUDREY M. CHU

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EDUCATION

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

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

EXPERIENCE

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

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

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

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

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

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

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

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

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

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

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

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

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

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

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

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

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

NON-TECHNICAL SKILLS & INTERESTS

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

CAMERON J. NASH

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EDUCATION

Georgetown University – Washington, DC

B.A in Finance

Anticipated Graduation: May 2025

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

TECHNICAL SKILLS

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

EXPERIENCE

Morgan Stanley – *Firmwide Strategy Student Consultant* | Remote

07/2022 – 08/2022

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

Credit Suisse – *HBCU Recruiting Student Consultant* | Remote

06/2022 – 07/2022

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

LEADERSHIP & SPECIAL ACTIVITIES

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

06/2022 – Present

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

Oliver Wyman – Introduction to Consulting 101 Participant

06/2022 – 08/2022

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

Bank of America – MAP Summer League Participant

06/2022 – 08/2022

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

Credit Suisse | Morgan Stanley – MAP Rising Stars Tournament Participant

06/2022 – 08/2022

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

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

06/2022 – 08/2022

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

Credit Suisse – Finance Open House Participant

06/2022 – 06/2022

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

Moody's – Introduction to Finance 101 Participant

06/2022 – 06/2022

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

NON-TECHNICAL SKILLS & INTERESTS

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

CLEVELAND L. SELLERS, IV

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EDUCATION

University of Notre Dame – South Bend, IN

GPA: 3.3/4.0

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

Anticipated Graduation: May 2025

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

TECHNICAL SKILLS

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

EXPERIENCE

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

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

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

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

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

07/2022 – 07/2022

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

Krustaceans Seafood Restaurant – *Cashier* | Charlotte, NC

06/2020 – 08/2022

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

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

07/2022 – 07/2022

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

LEADERSHIP & SPECIAL ACTIVITIES

Make A Play Foundation (MAP)

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

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

01/2023 – 01/2023

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

Derek J. Wong

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PROFESSIONAL EXPERIENCE

William Blair & Company

New York, NY

Investment Banking Analyst - Healthcare

July 2024 - Present

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

May 2023 - July 2023

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

Selected Transaction Experience

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

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

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

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

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

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

Persient LLC

San Diego, CA

Investment Banking Summer Analyst, Sell-Side M&A

June 2022 - August 2022

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

IQ-Analog Corporation

San Diego, CA

Business and Software Development Intern

June 2021 - August 2021

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

EDUCATION

Carnegie Mellon University, Tepper School of Business

Pittsburgh, PA

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

May 2024

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

SKILLS AND INTERESTS

Licenses and Certifications: SIE, Series 63 and Series 79

Leadership: Make A Play Foundation - Junior Board Member

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

DILLON HOLIFIELD

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EDUCATION

Dartmouth College – Hanover, NH

GPA: 3.3/4.0

B.A. in Government | Concentration in Economics

Anticipated Graduation: May 2025

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

TECHNICAL SKILLS

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

EXPERIENCE

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

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

Morgan Stanley – *Firmwide Strategy Student Consultant* | Remote

07/2022 – 08/2022

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

Credit Suisse – *HBCU Recruiting Student Consultant* | Remote

06/2022 – 07/2022

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

LEADERSHIP & SPECIAL ACTIVITIES

Deloitte US – *MAP Entrepreneurial Leaders Mentee* | Remote

01/2023 – Present

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

Make A Play Foundation (MAP)

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

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

06/2022 – 08/2022

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

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

06/2022 – 08/2022

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

NON-TECHNICAL SKILLS & INTERESTS

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

DIMITRI C. NICHOLSON

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EDUCATION

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

GPA: 3.8/4.0

B.A. in Marketing and Operations | Business Analytics

Anticipated Graduation: May 2024

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

TECHNICAL SKILLS

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

EXPERIENCE

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

08/2022 – 10/2022

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

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

05/2022 – 08/2022

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

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

05/2022 – 07/2022

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

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

03/2022 – 05/2022

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

Credit Suisse – Strategy & Analytics Student Consultant | Remote

02/2022 – 03/2022

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

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

12/2021 – 02/2022

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

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

05/2021 – 09/2021

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

LEADERSHIP & SPECIAL ACTIVITIES

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

01/2022 – Present

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

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

02/2022 – 03/2022

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

EDWARD E. TURNER III

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EDUCATION

Columbia University – New York, NY

GPA: 3.2/4.0

B.A in Arts of Architecture

Anticipated Graduation: May 2023

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

TECHNICAL SKILLS

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

EXPERIENCE

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

06/2023 – 08/2023

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

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

06/2022 – 08/2022

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

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

05/2022 – 07/2022

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

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

03/2022 – 05/2022

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

LEADERSHIP & SPECIAL ACTIVITIES

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

03/2022 – Present

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

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

03/2022 – Present

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

Sponsors of Educational Opportunities (SEO) – Career Intern

01/2022 – Present

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

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

08/2019 – Present

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

Bank of America – MAP Finance Summer League Participant

06/2022 – 08/2022

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

NON-TECHNICAL SKILLS & INTERESTS

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

IZAIAH ROBINSON

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EDUCATION

Dartmouth College – Hanover, NH

GPA: 3.3/4.0

B.A. in Government & Economics

Anticipated Graduation: May 2024

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

TECHNICAL SKILLS

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

EXPERIENCE

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

06/2023 – 08/2023

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

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

09/2022 – 11/2022

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

InvestWithScout – *Finance Intern* | San Francisco, CA

06/2022 – 08/2022

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

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

06/2021 – 08/2021

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

LEADERSHIP & SPECIAL ACTIVITIES

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

11/2022 – Present

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

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

09/2022 – Present

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

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

09/2020 – Present

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

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

09/2022 – 11/2022

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

NON-TECHNICAL SKILLS & INTERESTS

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

JAMIE H. KIM

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EDUCATION

Yale University – New Haven, CT

GPA: 3.77/4.0

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

Anticipated Graduation: May 2025

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

EXPERIENCE

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

01/2023 – 03/2023

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

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

05/2022 – 06/2022

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

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

05/2021 – 08/2021

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

12/2023 – Present

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

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

08/2021 – Present

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

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

05/2021 – Present

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

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

06/2019 – 05/2020

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

JONATHAN K. SADDLER

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EDUCATION

Georgetown University | McDonough School of Business – Washington, DC

GPA: 3.9/4.0

B.A. in Business Management and Marketing

Anticipated Graduation: May 2023

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

TECHNICAL SKILLS

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

EXPERIENCE

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

06/2022 – 08/2022

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

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

02/2022 – 04/2022

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

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

12/2021 – 02/2022

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

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

08/2021 – 10/2021

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

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

06/2021 – 08/2021

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

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

06/2021 – 08/2021

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

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

05/2021 – 07/2021

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

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

01/2020 – 01/2021

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

LEADERSHIP & SPECIAL ACTIVITIES

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

03/2021 – 04/2022

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

JUSTIN LIU

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EDUCATION

Harvard University – Cambridge, MA

GPA: 3.8/4.0

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

Anticipated Graduation: May 2025

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

EXPERIENCE

Deloitte – *Business Tech Solutions Student Consultant* | Remote

07/2023 – Present

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

Atomic – *Software Engineer Intern* | Cambridge, MA

05/2023 – 06/2023

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

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

09/2022 – 06/2023

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

06/2023 – Present

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

Asian American Brotherhood – Member | Cambridge, MA

02/2023 – Present

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

Harvard Data Analytics – Data Analyst | Cambridge, MA

09/2022 – Present

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

Harvard Fencing Team – Captain | Cambridge, MA

05/2022 – Present

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

Leverett House Committee – Formal Chair | Cambridge, MA

09/2022 – 05/2023

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

NON-TECHNICAL SKILLS & INTERESTS

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

KATIE A. POU

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EDUCATION

University of Pennsylvania – Philadelphia, PA

GPA: 3.1/4.0

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

Anticipated Graduation: May 2025

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

EXPERIENCE

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

01/2023 – 03/2023

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

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

06/2022 – 08/2022

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

01/2023 – Present

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

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

09/2021 – Present

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

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

06/2020 – 07/2021

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

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

08/2019 – 06/2021

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

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

08/2020 – 05/2021

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

KENDALL SMITH

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EDUCATION

Howard University – Washington, DC

GPA: 3.8/4.0

B.B.A. in Finance

Anticipated Graduation: May 2024

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

The Marquee Group – Remote

Certification in Online Skills Training for Finance

06/2021 – 08/2021

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

EXPERIENCE

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

06/2023 – 08/2023

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

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

06/2022 – 08/2022

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

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

03/2021 – 04/2022

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

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

04/2021 – 09/2021

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

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

06/2021 – 08/2021

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

ColorVizion Lab – *Student Consultant* | Remote

05/2021 – 07/2021

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

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Howard Volleyball Leadership Council – Team Leader | Washington, DC

08/2021 – Present

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

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

08/2020 – Present

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

Leadership Summits – Selected Participant | Multiple Locations & Venues

08/2020 – 07/2021

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

CLUBS & ORGANIZATIONS

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

LEXI D. LOVE

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EDUCATION

Brown University – Providence, RI

GPA: 3.4/4.0

B.A. in Business Economics

Anticipated Graduation: May 2023

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

TECHNICAL SKILLS

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

EXPERIENCE

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

06/2022 – 08/2022

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

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

12/2021 – 02/2022

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

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

08/2021 – 10/2021

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

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

06/2021 – 08/2021

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

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

05/2021 – 07/2021

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

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

09/2020 – 06/2021

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

New Way Homes – *Summer Intern* | Remote

06/2020 – 08/2020

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

LEADERSHIP & SPECIAL ACTIVITIES

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

03/2021 – 04/2022

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

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

06/2021 – 01/2022

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

Morgan Stanley Student-Athlete Mentorship Program – MAP Mentee

06/2021 – 08/2021

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

Lindsey Zhang

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Education

Harvard University Cambridge, MA

GPA: 3.86/4.0

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

Graduation Date: May 2025

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

Experience

Bank of America Merrill Lynch

06/2024 – 08/2024

Mergers & Acquisitions Investment Banking Summer Analyst

New York, NY

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

Selected Transaction Experience:

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

UBS Investment Bank

06/2023 - 08/2023

Global Markets Sales & Trading Summer Analyst

New York, NY

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

Morgan Stanley

07/2022 - 08/2022

Strategy Student Consultant - Make a Play Foundation

Remote

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

Heineken USA & The Kraft Heinz Company

03/2022 - 05/2022

Strategy & Insights Student Analyst - Make a Play Foundation

Remote

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

Leadership & Activities

Harvard University Varsity Volleyball Team

08/2021 - Present

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

Cambridge, MA

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

Make a Play Foundation (MAP)

03/2022 - Present

Junior Board Member

Remote

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

Skills & Interests

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

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

Michaela E. Stanfield

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EDUCATION

University of Pennsylvania

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

Philadelphia, PA
Expected Graduation: May 2024

The Winsor School

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

Boston, MA
June 2020

PROFESSIONAL EXPERIENCE

Massachusetts Attorney General's Office

Intern

Boston, MA
May 2021-Aug. 2021

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

Converse

Intern

Boston, MA
April 2020

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

LEADERSHIP EXPERIENCE & AFFILIATIONS

University of Pennsylvania, Varsity Women's Basketball Team

Student Athlete

Philadelphia, PA
Aug. 2020 – Present

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

University of Pennsylvania, Black Pre-Law Association

Member

Philadelphia, PA
Aug. 2020 – Present

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

The Winsor School, Single-Parent Family Outreach Club

Organization Leader

Boston, MA
Aug. 2018 – June 2020

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

Greenwood Elementary School, Tutoring Program

Tutor

Boston, MA
Aug. 2016 – June 2020

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

The Winsor School, Varsity Basketball Team

Team Captain

Boston, MA
Aug. 2016 – June 2020

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

SKILLS & INTERESTS

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

Interests: Mentoring, Basketball, Youth Engagement, Travel

SOLOMON J. CHRISTOPHER

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EDUCATION

Amherst College – Amherst, MA

GPA: 3.6/4.0

B.S. in Mathematics | SAT: 1390

Anticipated Graduation: May 2025

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

EXPERIENCE

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

January 2024 – Present

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

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

March 2021 – Present

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

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

June 2023 – August 2023

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

December 2023 – Present

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

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

August 2021 – Present

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

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

February 2023 – May 2023

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

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

August 2020 – May 2021

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

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

August 2020 – April 2021

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

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

June 2020 – August 2020

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

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Mathematics, Cooking, and Dogs.

WINTA W. TEWOLDE

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EDUCATION

Columbia University – New York, NY

GPA: 4.12/4.0

B.A. in Economics

Anticipated Graduation: May 2025

- **Accomplishments:** NCAA Division I Student-Athlete (Columbia University Women's Tennis); Dean's List (Fall 2021 – Present)
Columbia University Student-Athlete Advisory Committee (Active Member); Black Student Athlete Association (Active Member)
- **Relevant Courses:** Calc-Based Statistics, Global Economy, Intermediate Macroeconomics/Microeconomics, Principles of Economics
- **Industry Education:** Building a Financial Model, Core Data Analysis, Core Financial Concepts, Finance Interview Prep, Valuation 1: DCF
- **Leadership Events:** Participated in Leadership Events with Bank of America, Deloitte, Evercore, Oliver Wyman & JP Morgan Chase & Co.

EXPERIENCE

DICK'S Sporting Goods – *Compliance, Risk & Advisory Student Consultant* | Remote

01/2023 – 03/2023

- Designed a national marketing campaign to promote DSG's products to 100K+ new female customers for Women's History Month in 2023
- Owned the 'monitor phase,' creating a risk assessment matrix to define varying risk levels color-coded by severity (i.e., low risk → green)
- Developed a KPI framework with 5+ S.M.A.R.T. business metrics & synthesized findings from research into a cohesive roadmap for DSG
- Coordinated a communication strategy to ensure: (1) high-level awareness of the plan; and (2) anchor changes into DSG's company culture
 - **ADKAR:** applied ADKAR assessment to build **A**wareness/**D**esire/**K**nowledge/**A**bility/**R**einforcement of the plan with employees
 - **Lewin's 3-Stage Model:** evaluated 3 stages (freeze, change, refreeze) to communicate the logic behind the female-focused plan

Dembe Sembel Tennis Program – *Tutor & Coach* | Dembe Sembel, Eritrea

06/2022 – 08/2022

- Coached 5+ Eritrean girls aged 13-15 in a traditional society that provides women with limited resources an opportunity to play sports
- Tutored and mentored said girls (native Tigrinya speakers) on a daily basis to improve their vocational English-speaking skills
- Collaborated with the Eritrea Tennis Federation to organize the provision of new racquets and balls to the Eritrean tennis community

Peninsula Tennis Club – *Tennis Coach & Instructor* | San Diego, CA

08/2022 – 09/2022

- Taught a tennis clinic 20+ amateur athletes 2x per week, leveraging experience as a college athlete to help them improve their games
- Managed 5 assistant coaches to assist in training, allotting them each with a few clients and providing them with drills to feed our clients
- Led clients to tremendous improvements in a month, receiving positive feedback about coaching style & requests to keep the clinic running

LEADERSHIP & COMMUNITY DEVELOPMENT

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

09/2022 – Present

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

Student-Athlete Advisory Committee (Columbia Chapter) – *Team Representative* | New York, NY

09/2021 – Present

- Appointed as 1 of 60 student athletes nominated by coaches out of 750+ candidates to serve as a liaison to the athletic department, regularly meeting every other week to discuss upcoming events to help students-athletes have a better collegiate experience on and off the field
- Hosted virtual networking events to connect alumni working in film and television with 75 students looking to possibly pursue a career in the film, media, or entertainment industry, helping them learn the steps necessary to enter a slightly more difficult & less linear career path
- Fostered & led communication between the administration & all 31 varsity sports programs, creating an open & collaborative environment

Columbia Women's Tennis Team – *NCAA Division I Student-Athlete* | New York, NY

09/2021 – Present

- Handled approximately 35+ hours per week of practice, competition, service, and travel while balancing a full academic course load
- Won doubles match to clinch the team's doubles point against the U. Michigan (a top 20 school), serving two aces in the final game to win
- Liaised between the Columbia Women's tennis team and the Women's Tennis Head Coach, communicating with my teammates on what they feel needs to improve in practice and later initiating meetings with my Coach to discuss ways to implement these improvements

San Diego Eritrean Community – *Feed the Homeless Volunteer* | San Diego, CA

07/2021 – 08/2021

- Planned and actively managed an event with the San Diego Eritrean community to feed 100+ homeless people downtown San Diego
- Distributed food and water to the homeless, canvassing street by street to feed as many people-in need as possible for an entire month
- Volunteered 20+ hours of service to feed the homeless & personalized strategy to help our group distribute meals in the most efficient way

Personal Tennis Clinic – *Coach/Mentor* | La Mesa, CA

04/2021 – 05/2021

- Conducted a tennis clinic for lower-income, black elementary students to help them pursue their passion in an expensive sport, growing the program from 5 to 20 clients in just a month's span & helping attract, engage, and retain a new generation of diverse tennis athletes
- Planned and managed 30 different practice sessions by providing my own equipment, ultimately creating a space for these young children to enjoy tennis and improve their skills without the fear of not being able to afford equipment or rent courts for practice time
- Volunteered 7+ hours of service/week to work with the students in the program first-hand, customizing personal plans to help them achieve their tennis goals, allowing each student to play the game of tennis free of charge and feel more confident about their game(s)