

AVI S. AGARWAL

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EDUCATION

Princeton University – Princeton, NJ

GPA: 3.75/4.0

B.A. in Economics | Minor in Finance, Statistics and Machine Learning | SAT: 1560

Anticipated Graduation: May 2026

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

EXPERIENCE

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

January 2024 – Present

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

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

April 2023 – June 2023

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

Citizens' Climate Lobby – *Princeton Chapter Member* | Remote

May 2020 – September 2022

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

New Jersey Squash Club – *Squash Coach* | Lawrenceville, NJ

November 2020 – December 2020

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Princeton Squash Team – CSA Division I Student-Athlete | Princeton, NJ

September 2022 – Present

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

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

August 2022 – August 2022

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

Village Book Builders – Mentor | Remote

September 2020 – June 2022

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

StreetSquash – Princeton Team Captain & Participant | Remote

May 2017 – October 2020

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

NON-TECHNICAL SKILLS & INTERESTS

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

BRIDGET S. O'KEEFE

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EDUCATION

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

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

Cumulative GPA: 3.6/4.0

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

Palo Alto High School – Palo Alto, CA

June 2022

GPA (Unweighted) 3.8/4.0 SAT score: 1520

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

EXPERIENCE

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

June 2024 – Present

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

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

June 2023 – August 2023

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

Project Destined – Intern, Chatham Financial | Remote

January 2023 – April 2023

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

LEADERSHIP & SPECIAL ACTIVITIES

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

August 2022 – Present

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

Girls Who Invest | Remote

January 2024 – Present

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

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

January 2024 – Present

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

Make A Play Foundation (MAP) | Remote

December 2022 – February 2023

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

TECHNICAL SKILLS

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

NON-TECHNICAL SKILLS & INTERESTS

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

CHASON C. BARBER

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EDUCATION

Brown University – Providence, RI

GPA: 3.5/4.0

B.A. in Business Economics | ACT: 31

Anticipated Graduation: May 2026

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

EXPERIENCE

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

04/2023 – 06/2023

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

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

06/2022 – 08/2022

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Warburg Pincus – MAP Elite 100 Investment Fellow | Remote

09/2023 – Present

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

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

04/2023 – 06/2023

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

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

09/2022 – Present

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

Greenwich High School – Basketball Team Captain | Greenwich, CT

12/2021 – 03/2022

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

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

06/2019 – 08/2020

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

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

03/2020 - 06/2020

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

Greenwich Youth Conservation – Manual Labor | Greenwich, CT

06/2018 – 07/2018

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

NON-TECHNICAL SKILLS & INTERESTS

- Interests: I like to play golf!

CHRISTIANA A. NWACHUKU

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EDUCATION

University of Pennsylvania – Philadelphia, PA

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

GPA: 3.1/4.0

Anticipated Graduation: May 2026

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

EXPERIENCE

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

04/2023 – 06/2023

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

Springview Pharmacy – Pharmaceutical Assistant Intern | Irvington, NJ

06/2021 – 08/2022

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

Camp Dudley at Kiniya – Junior Leader | Colchester, VT

07/2016 – 08/2022

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

04/2023 – 06/2023

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

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

09/2020 – 08/2022

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

Kent Place Computer Science Club – President | Summit, NJ

09/2019 – 06/2022

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

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

09/2017 – 06/2022

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

BudDE Connect – Camp Counselor | Remote

07/2022 – 07/2022

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

NON-TECHNICAL SKILLS & INTERESTS

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

EVA F. ELBAZ

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EDUCATION

Princeton University

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

Princeton, NJ

Anticipated Graduation : May 2026

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

Bradenton, FL

Sept. 2020 – June 2022

IMG Academy | High school – GPA : 3.8/4.0

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

EXPERIENCE

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

Paris, FR

Summer 2024

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

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

Paris, FR

May – Aug. 2023

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

LEADERSHIP & ACTIVITIES

Princeton University Tennis Team | NCAA Division I Student-Athlete

Princeton, NJ

Aug. 2022 - Present

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

Athlete to Mentor | Mentoring students

Princeton, NJ (Remote)

Sept. 2023 – Present

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

World Maccabiah Games

Jerusalem, ISRL

June – July 2021

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

INTERESTS & CERTIFICATION

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

FRED A. WARE

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EDUCATION

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

GPA: 3.88/4.0

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

Anticipated Graduation: Spring 2026

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

EXPERIENCE

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

February 2024 – Present

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

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

January 2023 – Present

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

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

July 2023 – August 2023

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

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

April 2023 – June 2023

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

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

January 2022 – August 2022

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

August 2022 – Present

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

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

November 2022 – November 2022

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

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

August 2021 – May 2022

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

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

April 2021 – December 2021

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

NON-TECHNICAL SKILLS & INTERESTS

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

GRACE Y. ZHOU

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EDUCATION

Columbia University – New York, NY

GPA: 4.0/4.0

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

Anticipated Graduation: May 2026

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

EXPERIENCE

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

September 2023 – November 2023

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

Lifetime Aquatics – *Assistant Manager* | Bridgewater, NJ

May 2023 – August 2023

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

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

June 2021 – August 2023

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Arctos Sports Partners – MAP Elite 100 Investment Fellow | Remote

November 2023 – Present

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

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

October 2022 – Present

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

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

September 2019 – June 2022

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

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

October 2021 – February 2022

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

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

July 2020 – August 2020

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

NON-TECHNICAL SKILLS & INTERESTS

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

JACQUELINE K. JASKIEWICZ

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EDUCATION

Georgetown University – Washington, DC

GPA: 3.6/4.0

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

Anticipated Graduation: May 2026

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

EXPERIENCE

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

January 2024 – Present

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

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

June 2023 – August 2023

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

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

June 2021 – August 2021

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

December 2023 – Present

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

Georgetown Entrepreneurship Club – *Member* | Washington, DC

September 2023 – Present

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

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

August 2022 – Present

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

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

August 2022 – Present

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

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

November 2022 – November 2022

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

NON-TECHNICAL SKILLS & INTERESTS

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

JAMES M. MCCAULEY

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EDUCATION

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

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

EXPERIENCE

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

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

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

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

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

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

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

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

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

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

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

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

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

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

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

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

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

NON-TECHNICAL SKILLS & INTERESTS

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

JEDIN J. TRUONG

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EDUCATION

- University of California Berkeley, Haas School of Business** – Berkeley, CA **Expected Graduation: 2026**
B.S. Business Administration, B.A. Data Science
- **Accomplishments:** NCAA Division I Student-Athlete, Pac-12 Champion, National Champion
 - **Relevant Courses:** Statistics and Probability, Data Science, Economics, Principles of Business, Calculus, Computer Science
- London School of Economics and Public Policy** – London, UK **Summer 2024**
- **Relevant Courses:** Computational Methods for Financial Mathematics, Econometrics, Political Economy of Public Policy

EXPERIENCE

- Valley Consulting Group** – *Project Leader* | Berkeley, CA **08/2023 – Present**
- Consultant for Berkeley's premiere tech-consulting group (<https://vcg.berkeley.edu>) working with Fortune 500's and industry-leading tech companies. Past clients include Google, Microsoft, Youtube, Costco, Spotify, Disney, Nike, LinkedIn, Airbnb, and Roku.
 - Developed a go-to-market strategy for Notion in Fall 2023. Conducted market research and presented final deliverable to CPO and Founder
 - Appointed as a Project Leader for Fall 2024. Currently sourcing for potential clients.
- Google** – *Finalist* | Haas Business School Association Case Competition **04/2024**
- Created an investment recommendation via market research and financial analysis in 48 hours, presented to a Google program manager.
 - https://docs.google.com/presentation/d/1TPMGH3kCVUXRc_NnXswmUla0vEOU63HsqRqaMsJ1Uqs/edit?usp=sharing
- Nike** – *Team Leader* | Student Athlete Business Network Case Competition **03/2024**
- Led 5 Student Athletes in their first case competition through competitive analysis, decking, and presenting a marketing campaign.
- PWC** – *Team Leader* | PWC Case Competition **09/2023**
- Led a team of 3 in recommending initiatives to boost employee morale post-layoffs at hypothetical company Z-Comm, presented to judges.
 - <https://drive.google.com/file/d/16zs7iwZtjnxhx6RIz-wSxZ5CBVPb2H3O/view?usp=sharing>
- CitiesGPS** – *Summer Data Analyst* | Washington D.C/Remote **06/2023 – 08/2023**
- Researched alongside the Brookings Institution analyzing public data packages using 'R' to determine economic growth opportunities in California 'UPLIFT' and Sacramento regions. Analysis included: industry similarities, occupation similarities, transferable labor skills.
 - Utilized powerpoint softwares like 'Canva' to format engaging and informative deliverables to drive informed decision-making.
 - Skills Practiced: R, Python, Rstudio, Canva, Flourish
- Morgan Stanley** – *Student Analyst; Scrum Master* | Remote **04/2023 – 06/2023**
- Selected to participate in an invite-only case competition with Morgan Stanley's Fixed Income Division.
 - Developed a 2-page written project charter with a schedule of tasks to guide my scrum team of 5 within a 5-week deadline.
 - Approved and presented a final 12-page slide deck, recommending the best asset class to invest in through the end of 2023.
- Industry Dive** – *Sales and Business Development Intern* | Washington D.C. **06/2022 – 08/2022**
- Pitched Industry Dive's content marketing services, StudioID, to previous clients, shifting them from newsletter advertising to digital content, and developing recommendations for content marketing product services through 250+ unique sales emails
 - Compiled a unique list of contacts from Industry Dive's previous relations with companies into Salesforce CRM database, prospecting 500+ new contacts in marketing, growth, and lead generation using Salesforce and SalesNavigator
 - Analyzed previous clients' digital content maturity by assessing their websites and scoring them on a scale of 0-5, reporting an assessment of over 35 companies and recommended best products and services to sales associates and managers

LEADERSHIP & COMMUNITY DEVELOPMENT

- UC Berkeley Men's Rowing** – NCAA Division I Student-Athlete | Berkeley, CA **08/2022 – Present**
- Execute race plans and enact coach's goals for the team during daily trainings and seasonal competitions, practicing 30 hours a week in preparation for Division I competition as defending National Champions and Pac-12 Conference Champions.
 - Identify and resolve conflicts among rotating team members in a daily boat setting, optimizing boat performance
 - Provide coaches with individualized progress reports and recommendations to optimize training plans for 67 competing athletes across 7 racing boats assisting the team in achieving first place in almost every race throughout the season
- Student Athlete Business Network (SABN)** - President | Berkeley, CA **06/2023 - Present**
- Connecting current Cal Student Athletes with industry professionals and career opportunities to bridge the gap between their dedication to athletics and their career aspirations in business. 21 varsity teams represented in SABN's active membership.
 - Opportunities include: Guest Speaker Series, Resume/Career Workshops, Networking Events, Case Competitions
- Make A Play Foundation (MAP)** – Morgan Stanley 'Skills Challenge' Mentee | Remote **04/2023 – 06/2023**
- Received 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for finance roles
 - Collaborated with a 4-person scrum team & Morgan Stanley mentor to deliver an investment thesis to the bank's Fixed Income Division
 - Technical Skills Acquired: Agile Project Management | Scrum Methodology | Public Speaking
- STEM to Stern** – Volunteer Assistant | Oakland, CA **08/2022 – 12/2022**
- Introduced the sport of rowing to students from underrepresented demographics to empower them athletes; of 40 students within the STEM to Stern program, more than 25+ moved onto higher level programs with Oakland Strokes Rowing Team
 - Coached rowing to students from Oakland Elementary and Middle schools, leading two three-hour practice sessions per week
 - Mentored students in the STEM to Stern program by sharing my experiences as a Division I Student Athlete and advising students on how to approach their futures both athletically and academically. Instilled new ideas and aspirations to the future generation

SKILLS & INTERESTS

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

JOSHUA S. WOLFSON

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EDUCATION

Dartmouth College – Hanover, NH

GPA: 3.92/4.0

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

Anticipated Graduation: May 2026

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

EXPERIENCE

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

October 2023 – November 2023

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

Lockheed Martin – Venture Capital Intern | Bethesda, MD

June 2023 – August 2023

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

Lionchase North America – Summer Analyst | Washington, DC

June 2022 – August 2022

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Warburg Pincus – MAP Elite 100 Investment Fellow | Remote

November 2023 – Present

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

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

September 2022 – Present

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

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

September 2023 – November 2023

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

Teens Helping Seniors – Volunteer | Potomac, MD

August 2020 – September 2022

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

IPaws – Co-Founder | Potomac, MD

June 2018 – September 2022

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

The Foodanator – Developer | Potomac, MD

Mach 2022 – May 2022

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

NON-TECHNICAL SKILLS & INTERESTS

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

KAMPTON KAM

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EDUCATION

University of Pennsylvania, Wharton School – Philadelphia, PA

GPA: 3.8/4.0

B.S. in Finance and Business Analytics

Anticipated Graduation: May 2026

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

EXPERIENCE

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

October 2023 – November 2023

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

Quest Ventures – Summer Analyst | Singapore

June 2023 – August 2023

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

Republic of Singapore Air Force – Company Quartermaster Sergeant | Singapore

January 2020 – November 2021

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Follow Through – Athlete Leader | Philadelphia, PA

January 2023 – Present

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

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

August 2022 – Present

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

Singapore National Olympic Council – Executive Committee | Singapore

August 2022 – Present

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

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

September 2023 – November 2023

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

NON-TECHNICAL SKILLS & INTERESTS

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

KENNEDY J. CALCAGNO

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EDUCATION

Texas Christian University – Fort Worth, TX

GPA: 3.76/4.0

B.A. in Finance | Minor in Accounting

Anticipated Graduation: May 2026

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

PROFESSIONAL EXPERIENCE

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

December 2024 – Present

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

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

May 2024 – August 2024

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

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

May 2023 – August 2023

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

Activities & LEADERSHIP EXPERIENCE

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

August 2022 – Present

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

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

January 2025 – Present

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

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

August 2023 – Present

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

Finance Club – *Member* | Fort Worth, TX

August 2024 – Present

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

NON-TECHNICAL SKILLS & INTERESTS

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

REBECCA R. LYNN

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EDUCATION

Yale University – New Haven, CT

GPA: 3.3/4.0

B.A. in Economics | SAT: 1440

Anticipated Graduation: May 2026

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

EXPERIENCE

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

January 2024

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

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

September 2023 – November 2023

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

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

June 2023 – August 2023

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

August 2022 – Present

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

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

June 2023 – Present

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

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

September 2022 – Present

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

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

September 2023 – November 2023

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

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

December 2022 – January 2023

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

NON-TECHNICAL SKILLS & INTERESTS

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

SERGIO ROJAS

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EDUCATION

Rice University – Houston, TX

GPA: 3.86/4.0

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

Anticipated Graduation: Spring 2026

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

EXPERIENCE

180 Degrees Consulting – Consultant | Houston, TX

01/2023 – Present

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

Rice Sports and Nutrition Center – Employee | Houston, TX

01/2023 – Present

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

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

04/2023 – 06/2023

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Warburg Pincus – MAP Elite 100 Investment Fellow | Remote

09/2023 – Present

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

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

08/2022 – Present

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

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

04/2023 – 06/2023

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

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

10/2022 – 02/2023

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

Best Buddies International – President | Houston, TX

04/2021 – 05/2022

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

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

03/2021 – 05/2022

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

Mathnasium – Tutor | Missouri City, TX

01/2021 – 05/2022

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

NON-TECHNICAL SKILLS & INTERESTS

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

SHOMARI D. STONE

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EDUCATION

University of Michigan – Ann Arbor, MI

GPA: 3.5/4.0

B.A. in Economics

Anticipated Graduation: May 2026

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

EXPERIENCE

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

January 2024 – March 2024

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

BlackGen Capital – Investment Analyst | Ann Arbor, MI

August 2022 – December 2023

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

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

June 2023 – August 2023

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

January 2024 – Present

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

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

August 2023 – Present

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

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

April 2022 – Present

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

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

October 2019 – June 2022

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

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

August 2017 – June 2019

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

NON-TECHNICAL SKILLS & INTERESTS

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

SOPHIA G. DAVIS

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EDUCATION

Tufts University – Medford, MA

GPA: 3.1/4.0

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

Anticipated Graduation: Spring 2026

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

EXPERIENCE

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

January 2024 – Present

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

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

July 2023 – August 2023

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

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

April 2023 – June 2023

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

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

June 2019 – April 2023

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

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

May 2021 – May 2022

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

September 2022 – Present

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

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

March 2020 – May 2023

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

Medford Department of Recreation – Volunteer | Medford, MA

January 2023 – January 2023

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

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

October 2022 – October 2022

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

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

June 2022 – June 2022

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

NON-TECHNICAL SKILLS & INTERESTS

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

SOPHIA R. SIMENZ

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EDUCATION

Columbia University – New York, New York

GPA: 3.8/4.0

B.A. in Economics and Psychology | Concentration in Business Administration | ACT: 33

Anticipated Graduation: 2027

- **Accomplishments:** Dean's List Spring 2024, Fall 2024, Varsity Letter Women's Rowing
- **Relevant Courses:** Economics, Calculus Based Statistics, Calculus 1, Social Neuroscience, Science of Psychology, Intermediate Spanish 1, Physics

PROFESSIONAL EXPERIENCE

The Milwaukee Brewers Baseball Club, MLB – Incoming *Business Analytics Intern* | Milwaukee, Wisconsin

05/2025 – 08/2025

- Assisted in building in-depth dashboards via Tableau to track KPIs related to tickets, marketing, and concessions to increase club sales performance
- Reported on insights and analyzed trends related to ticket sales, sponsorship, concessions performance, and sales campaigns, increasing revenues
- Performed analyses after market campaigns, ticket offers, and food and beverage promotions to assess performance and identify areas for growth
- Used SQL to pull data for email lists and sales campaign audiences to better understand target audiences and improve fan experiences
- Completed ad-hoc analyses to deliver actionable consumer insights for business and operational decisions, increasing brand efficiency

US Rowing Foundation – *Brand Development Intern* | Remote

08/2022 – 08/2024

- Designed and distributed surveys on over 20 measurables using Qualtrics, then analyzed responses in Tableau from elite athletes, coaches, and partners to identify key areas for improvement within the National Team System
- Presented data-driven recommendations to board members by coordinating and leading meetings with interns, athletes, and stakeholders, resulting in adopted strategies that are currently improving athlete retention and well-being
- Spearheaded grassroots marketing campaigns to expand rowing participation in the Midwest, fostering inclusive community engagement and increasing regional awareness of program initiatives
- Produced targeted digital content and managed external communications with teams, rowers, and investors, driving a 25% increase in program visibility and strengthening stakeholder relationships

The Town Club – *Snack Bar Sales Lead* | Fox Point, Wisconsin

06/2021 – 08/2024

- Gained hands-on experience in customer service, POS systems, bookkeeping, and business operations while working in a high-volume snack bar, contributing to efficient and smooth daily operations
- Processed customer orders, prepared food, and maintained cleanliness in a fast-paced environment, ensuring high customer satisfaction and a safe, welcoming atmosphere increasing positive customer experiences
- Promoted to Snack Bar Lead after 2 years, where I supervised staff and coordinated daily tasks, resulting in improved team productivity and consistent service quality, generating the greatest overall revenue of any summer

LEADERSHIP & COMMUNITY DEVELOPMENT

MAP x Microsoft – “*Game Managers*” *Product Management Fellow (Phase 1 & 2)* | Remote

03/2025 – Present

- **Phase 1:** Selected to participate in an exclusive 3-week interview preparation bootcamp for high-achieving college athletes, competing against 200+ others in 3 mock interviews sponsored by Microsoft, achieving a score of 90%+ in all 3 interviews and earning a top spot on MAP's Leaderboard
- **Phase 2:** Qualified for Phase 2 of the fellowship based on strong performance in Phase 1 (90%+), collaborating with a team of 6 to co-design a cutting-edge sports training copilot that leverages AI to deliver a highly personalized training experience for athletes, specifically focusing on problem discovery, competitor research, solution development, go-to-market strategy, and tradeoffs/risk and mitigation strategies

Columbia University Division 1 Varsity Rowing – *Student Athlete* | New York, New York, State

September 2023 – Present

- Committed 30+ hours per week year-round to a nationally ranked Division I rowing team, developing leadership, perseverance, and time management while maintaining a rigorous academic course load
- Stepped into the role of interim Team Manager during the 2024–2025 redshirt season, overseeing equipment maintenance, community service coordination, data collection, and social media management to ensure smooth team operations

Columbia University Global Health and Equity – *Grant Writing Committee* | New York, New York

September 2024 – Present

- Recruited to join a campus public health club, where I conducted research, led fundraising efforts, and raised awareness about global health inequities through weekly strategy and planning meetings leading to more than \$5000 in funding being acquired
- Elected to the grant writing committee, drafting and submitting grant applications on behalf of Columbia's partner organization in Uganda, contributing to increased funding and support for community health initiatives

Streetlife Communities – *Health Equity Volunteer* | Milwaukee, Wisconsin

March 2012 – August 2023

- Coordinated donation drives and food distribution efforts, engaging with individuals from diverse backgrounds to understand their needs and provide meaningful support to increase community wellbeing
- Led the assembly of over 200 food bags and managed donations, ensuring resources were allocated efficiently and fostering strong relationships with community members generating greater efficiency

SKILLS & INTERESTS

- **Skills:** Microsoft Excel, Qualtrics, Tableau, Python, SQL, POS, Analytical Research, Data Analysis, Economic Analysis, Brand Development
- **Programs and Language(s):** CEFR B2 certification in Spanish (advanced proficiency)
- **Interests:** Professional Sports, Exploring Global Cuisines, Yoga, Traveling, Youth Mentorship and Engagement

SOPHIA C. STELLABOTTE

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EDUCATION

Columbia University – New York, NY

GPA: 3.94/4.0

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

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

Case Western Reserve University – Cleveland, OH

GPA: 3.90/4.0

Attended from August 2021–May 2024

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

PROFESSIONAL EXPERIENCE

Nexus Engineering Group – *Engineering Consulting Intern* | Cleveland, OH

Summer 2025, 09/2023 – 05/2024

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

Manhattan SC – *Soccer Coach* | New York, NY

05/2021 – Current

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

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

07/2024 – 08/2024

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

E3 Scholars – *Academic Tutor* | New York, NY

05/2022 – 09/2023

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

Starbucks – *Barista* | New York, NY

05/2023 – 08/2024

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

LEADERSHIP & COMMUNITY DEVELOPMENT

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

January 2025 – Present

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

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

08/2021 – Current

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

American Institute of Chemical Engineers (AIChE) – *President* | Cleveland, OH

04/2023 – 05/2024

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

Civic Center For Engagement and Learning (CCEL) – *CCEL Scholar* | Cleveland, OH

08/2021 – 05/2023

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

NON-TECHNICAL SKILLS & INTERESTS

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

SYDNEY A. LU

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EDUCATION

Harvard University – Cambridge, MA

GPA: 3.72/4.0

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

Anticipated Graduation: May 2026

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

EXPERIENCE

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

December 2023

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

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

September 2023 – November 2023

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

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

April 2023 – June 2023

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

The Borgen Project – *Regional Director* | Remote

January 2021 – March 2022

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

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

March 2019 – March 2022

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

LEADERSHIP & COMMUNITY DEVELOPMENT

Pleasanton Seahawks Swim Team – Team Captain | Pleasanton, CA

September 2020 – August 2022

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

WaterWish Foundation – Co-Founder | Oakland, CA

August 2013 – August 2022

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

The African Library Project – Book Drive Coordinator | Remote

June 2020 – June 2021

- Directed a charity initiative via online media marketing techniques and campaign events centered on aiding literacy in African communities, resulting in the collection, sorting, and shipment of 8,000+ books
- Headed fundraising procedures for the shipment of donated books to African countries by leading speaker events at local high schools and swimming teams, accumulating donations amounting to \$1,000+
- Awarded the Gold Literacy Award for donating enough books to build libraries in five different African nations, including Malawi, Botswana, Uganda, Lesotho, and Ghana

Pacific Swimming Association – Senior Athlete Representative; Swimming Team Captain | Pleasanton, CA

August 2016 – August 2018

- Chaired the Pleasanton Seahawks Athlete Representative position on the Pacific Swimming board, advocating for swimmers' rights and the establishment of more inclusive policies for low-income households, including a ban on technical racing suits for athletes 12 and under
- Campaigned as a Senior Athlete representative on the Board of Directors and Head Swimming Offices for the Pacific Swimming Zone, contributing to the implementation of diversity, age-group, and all-star programs
- Mentored and successfully transitioned the Senior Athlete Representative role to a younger generation of swimmers in order to focus on new responsibilities as Team Captain of the Pleasanton Seahawks Senior Elite training group

NON-TECHNICAL SKILLS & INTERESTS

- **Interests:** Surfing, Running, Hiking, Reading, Traveling, Seizing new opportunities as the first-generation daughter of immigrants.

USIM (EMMANUEL) KALU ODIM

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EDUCATION

Amherst College – Amherst, MA

GPA: 3.77/4.0

B.A. in Economics & Biochemistry | SAT: 1530

Anticipated Graduation: May 2026

- **Accomplishments:** NCAA Division III Student Athlete; MAP x Morgan Stanley First-Year Fixed Income Scholar
- **Relevant Courses:** Introduction to Economics, Statistical Analysis, Introduction to Computer Science, Probability, Microeconomics
- **Wall Street Prep Education by 2024:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

EXPERIENCE

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

January 2024 – Present

- Advised Warburg on the potential acquisition of a small HVAC company, specifically tasked with building my team's balance sheet organized by assets (current assets, property/plant/energy, intangible assets) & liabilities (current liabilities, long-term liabilities, equity)
- Forecasted 5+ potential assumptions to guide the team on ways to strengthen our business, including: (1) Revenue Growth Rate; (2) Costs of Goods Sold; (3) Gross Margins; (4) Operation Expenses; (5) EBITDA Margin; (6) Capital Expenditures; and (7) Debt Financing
- Consolidated team's balance sheet + assumptions into 2 PowerPoint slides to present the execution phase of the project to Warburg leaders

Morgan Stanley – *Fixed Income Student Analyst; Investments (Team Mellody Hobson)* | Remote

April 2023 – June 2023

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

The Office of Finance Management for the National Institute of Health – *Student Trainee* | Bethesda, MD

June 2021 – August 2022

- Streamlined communication processes between 27 NIH Institutes & the Office of Finance Management, leading to faster fiscal transactions
- Monitored and documented vendor transactions across 27 NIH Institutes, expediting the end-of-year review process
- Proactively managed NIH vendor sites to reactivate dormant vendor accounts, ensuring immediate institute access upon request

Dr. Komkov Ph.D. of Sandia Laboratories – *Lab Assistant* | Remote

June 2021 – November 2021

- Collaborated with Dr. Komkov of Sandia Laboratories to develop a program that uses a complex neural network system to accurately detect diseased retinas with over 90% accuracy
- Enhanced the program's accuracy by integrating fabricated training data of rotated and brightened images, resulting in a 10% improvement in detection rates
- Optimized the program's performance by cleaning up the original retina dataset to minimize potential errors

LEADERSHIP & COMMUNITY DEVELOPMENT

Amherst College Varsity Swimming & Diving – Student Athlete | Amherst, MA

August 2022 – Present

- Commit 20+ hours a week to training, meets, travel, film sessions, individual/team meetings, community service
- Led a six-member board of teammates, appointed by the coach, to identify issues affecting team dynamics and develop an action plan to foster a positive team culture
- Coordinate team-building events outside of practice, fostering strong team chemistry + a sense of shared investment in each other's success

Montgomery Blair High School Varsity Swimming & Diving – Captain | Silver Spring, MD

August 2021 – June 2022

- Developed and implemented successful practice strategies throughout the season, culminating in the team's promotion from Division I to Division II in Maryland - a first-time achievement for the team
- Mentored and supported underclassmen teammates, empowering them to perform under pressure and feel confident in their abilities
- Appointed team captains for the following season, ensuring continuity and continued success

Financial Literacy Club (Montgomery Blair High School) – Co-Founder | Silver Spring, MD

August 2020 – June 2022

- Designed lecture slides for an English to Speakers of Other Languages (ESOL) teacher to incorporate basic financial literacy skills into their instruction, helping students develop essential financial competencies
- Advocated for financial literacy to be included in the school's curriculum, spearheading a successful campaign that resulted in the creation of a new elective course in this subject area
- Provided training in basic financial literacy to members of our club, empowering them with financial knowledge and skills as they prepare to transition into adulthood

ACES University of Maryland – Assistant | Shady Grove, MD

August 2019 – September 2019

- Recruited high school seniors from across Maryland to participate in the University of Maryland's medical program, introducing them to the field of medicine and inspiring their academic and career aspirations
- Assisted a physician in running a laboratory for prospective students, enabling them to gain insights into new and exciting medical mechanisms and practices
- Guided students in conducting an experiment to explore the limitations of basic soap, fostering their curiosity and critical thinking skills

NON-TECHNICAL SKILLS & INTERESTS

- **Interests:** Sports Medicine, Sport Performance, Basketball, Statistics.

SARA “VALENTINA” CRUZ

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EDUCATION

Dartmouth College – B.A. in Economics – June 2026

GPA: 3.81/4.0

- **Accomplishments:** NCAA Student-Athlete (Dartmouth Women’s Tennis); 2022-2023 Intercollegiate Tennis Association Scholar Athlete
- **Relevant Courses:** The Price System, Essential Math for Economic Analysis, Macroeconomics, Introduction to Statistical Methods, The Economics of Financial Intermediaries and Markets (Winter 2024), International Trade (Winter 2024), Computer Science 1 (Spring 2024)

EXPERIENCE

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

October 2023 – Present

- Leading the “control phase” of a 5-week project for Bank of America’s Equity Division, collaborating with my team’s mentor, [Jawad Khan](#), to choose the best portfolio of stocks for my team’s clients to allocate their money into until the end of the year (min. of 3 securities)

Office of Residential Life — *Undergraduate Advisor* | Dartmouth College, Hanover, NH

August 2023 – Present

- Foster a supportive community within the dormitory, ensuring the well-being and safety of 40 residents
- Create four engaging programs/events per term that encourage positive interactions, personal growth, and inclusivity
- Effectively address and resolve conflicts, demonstrating strong interpersonal and communication skills
- Collaborate with a diverse team of advisors to ensure a cohesive and harmonious living environment

MC Surfaces Inc. — *Accounting Intern* | Houston, TX

July 2023 – August 2023

- Applied quantitative methodologies to meticulously review and validate purchase orders, invoices, and accounts payable
- Managed accounting processes using Excel and Sage software to compile and analyze financial data
- Managed inventory allocation procedures for precise tracking, minimizing stock discrepancies and improving supply chain efficiency
- Collaborated closely with cross-functional teams to verify purchase details, resolve discrepancies, and facilitate timely vendor payments

Department of Spanish, Dartmouth College — *Spanish Teaching Assistant* | Part-time | Hanover, NH

March 2023 – June 2023

- Conducted systematic, meaningful, & communicative drill exercises for groups of 4-5 students, resulting in improved student performance
- Enhanced student learning by optimizing a wide range of instructional approaches and innovative classroom activities
- Facilitated and moderated classroom discussions 3x a week with interactive, student-centered learning
- Collaborated closely with the Dartmouth Faculty for the implementation and improvement of the Spanish curriculum

DICK’S Sporting Goods (DSG) — *Financial Student Fellow* | Remote

January 2023 – March 2023

- Designed a national marketing campaign to promote DSG’s products to 100K+ new female customers for Women’s History Month in 2023
- Owned the ‘monitor phase,’ managing a **\$3.5M budget**, earmarking funds for direct (5+ quality creative assets) & indirect costs (personnel)
- Led benchmark analysis to compare spend rationalization against DSG female-focused initiatives:
 - **Good Sports:** audited a \$100k grant by DSG to distribute sports bras to under-resourced female athletes across the U.S. in 2021
 - **U.S. Girls Running Programs:** audited a \$500k grant by DSG to support under-resourced girls’ running programs in 2021

Dartmouth Leadership Attitudes and Behaviors Program (D-Lab) – *D-Lab Mentee* | Hanover, NH

January 2023 – March 2023

- Initiated conversation in small group discussions to understand the relationship between leadership and personal values
- Engaged in experiential, group activities to master core management and leadership skills
- Identified strengths and areas of needed growth to work effectively with others through cumulative self-reflection exercises

Buddy Up Tennis — *Tennis and Fitness Coach* | West Lebanon, NH

September 2022

- Collaborated with the tennis team to organize and lead tennis practices for children with Down Syndrome
- Demonstrated interpersonal skills, fostering teamwork and an inclusive environment of mutual support and achievement

LEADERSHIP & COMMUNITY DEVELOPMENT

Warburg Pincus – MAP Elite 100 Investment Fellow | Remote

November 2023 – Present

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

Habitat for Humanity – Volunteer | Hanover, NH

January 2023 – Present

- Help build residential units for low-income families from foundation to finish, including framing walls & installing windows and doors
- Communicate with the volunteer coordinator and site supervisor to ensure that organizational standards and expectations are met

Dartmouth Varsity Women’s Tennis – NCAA Division I Student-Athlete | Hanover, NH

September 2022 – Present

- Devote 25+ hours a week to: practice/training, film sessions, individual and team meetings, games, tutoring, travel, and community service
- Develop a results-oriented focus & skills in: communication, critical thinking, accountability, resiliency, teamwork, and time management

Credit Suisse – Market Madness Stock Pitch Participant | Remote

March 2023 – March 2023

- Collaborated with a team of 3 to virtually pitch a stock of our choice to members of Credit Suisse’s Equity Research and Markets teams
- Learned what it is like to work in Global Markets at Credit Suisse, while networking with research analysts, salespeople, and traders

TECHNICAL SKILLS

- **Performance Management:** created a KPI framework with business objectives & S.M.A.R.T. metrics for DSG
- **Accounts Payable:** processed payments and expenditures, including purchase orders, PO receipts, and invoices
- **Project Management Professional (PMP) Training:** controlled a 5-week project for DSG using [Monday.com](#)
- **Microsoft Office:** Word, Excel, PowerPoint, Teams
- **Sage accounting:** utilized to manage accounting processes
- **Scrum Methodology:** collaborated with a scrum team of 6 athletes to create a multi-year marketing strategy for DSG
- **Spanish:** native speaker / **Italian:** conversational

INTERESTS/CLUBS: Smart Women in Securities