

# Ajer Sher

ajers@uchicago.edu | 516-289-6678 | 5500 South University Avenue, Chicago, IL, 60637

## EDUCATION

### The University of Chicago

Bachelor of Arts in Economics and Computer Science | GPA: 3.90/4.00

Chicago, IL

Expected, June 2027

- **Financial Markets Program:** Selective, three-year program focused on building quantitative finance acumen through weekly workshops, personalized advising, employer visits, and coursework at the Chicago Booth School of Business

### Jericho High School

High School Diploma | GPA: 3.90/4.00

Jericho, NY

June 2023

- Honors Include: 34 ACT, AP Scholar with Honor (2023), Most Valuable Player (2023)

## WORK EXPERIENCE

### UBS

Incoming Global Markets Summer Analyst

New York, NY

June 2025 – August 2025

- Will assist in advising and executing clients' securities transactions by extracting market-moving data to inform decisions, shadowing different product teams to learn about client relationships, and understanding client needs based on market trends.

### M Capital Group

Investment Banking Fall Analyst

New York, NY

September 2024 – October 2024

- M Capital is a global merchant banking and advisory firm with expertise across the capital structure focused on structured transactions
- Independently performed due diligence by coordinating conference calls and collecting essential documents, including NDAs, CIPs, and teasers, from client companies to produce an executive summary on a potential M&A target in the EdTech industry
- Facilitated communication by accurately documenting conference call summaries between client companies and the managing partner

### Bormann Wealth Management

Equity Research Analyst

Spokane, WA

March 2024 – September 2024

- Conducted quantitative and qualitative research on 10-15 stocks in consumer goods and industrial technologies
  - Analyzed SEC filings, company reports, and financial statements to assess the financial health of publicly traded companies
  - Investigated industry dynamics within the sports & lifestyle and HVAC & building management verticals to identify emerging trends, moats, and growth channels to infer future performance
- Performed comparable analysis and benchmarked financial ratios and metrics against industry peers to assess market positioning
- Presented detailed investment theses to the founder, influencing the firm's strategic direction toward sustainable investments

### Alpha Sophia

Growth and Venture Intern – Healthcare Startup

Cologne, Germany

June 2024 – August 2024

- Conducted due diligence research, engaged with founders, and developed relationships with medical device companies to convert them into clients, resulting in 8 booked demo calls and 2 new customers contributing to the company's best sales month to date
- Authored multiple SEO articles on the MedTech and Healthcare industry, contributing to a 60% increase in brand visibility
- Successfully closed 2 customers after individually leading them through product demos and sales calls, increasing revenue by \$20,000
- Conducted detailed market analysis to identify expansion opportunities in telehealth and digital healthcare, driven by the integration of a new feature displaying individual medical practices and sites of care, resulting in a measurable increase in customer conversions

### Sher Marketing Agency

Founder and CEO

Jericho, NY

November 2023 – May 2024

- Founded a digital marketing agency that serves real estate agents in Long Island, NY, with social media and Google marketing services
- Achieved strong ROI figures for clients, with a median ROI of 110%, by managing data-driven advertising campaigns, optimizing marketing investments, conducting A/B testing, keyword optimization, and implementing demographic retargeting
- Led a team of 3 virtual assistants, each individually responsible for nurturing incoming leads, creating content, and outreach
- Created a structured sales funnel, utilized by virtual assistants and myself to streamline client acquisition and increase conversion rates

## LEADERSHIP & ACTIVITIES

### University of Chicago NCAA Varsity Tennis Team

Starter (2024 NCAA D3 Champion)

Chicago, IL

September 2023 – Present

- Competed as #3-4 singles starter on the #1 nationally ranked team, dedicating 25 hours weekly to training and competition
- 13-2 singles record at positions #3 and #4 during the 2024 season, leading to the program's second NCAA National Championship
- Joined as 5-Star Recruit ranked top 75 nationally, top 3 in New York, and as member of 2023's #1 Recruiting Class

### Undergraduate Investment Banking Group

Analyst

Chicago, IL

October 2024 – Present

- Developed corporate finance experience, knowledge, and skills for investment banking through weekly education modules
- Gained insight into finance practices through lectures and information sessions led by investment banking professionals and alumni

### Project V Consulting Solutions

Director of Marketing (Executive Board Member)

Chicago, IL

October 2023 – Present

- Designed and released targeted visual graphics and content pieces, boosting club visibility on campus and across social media platforms
- Led weekly market analysis sessions for new members, providing in-depth education on recent market trends, macroeconomic events, and current investment banking deals, enhancing their understanding of the financial industry

### Delta Sigma Pi

Fundraising Chair (Executive Board Member)

Chicago, IL

October 2023 – Present

- Coordinated accomplished professionals in finance and business development to participate in specialized speaking panels
- Planned multiple fundraising events each quarter to support the UChicago Chapter and contribute to various charitable organizations

## ADDITIONAL INFORMATION

**Skills:** Microsoft Excel, Microsoft PowerPoint, G-Suite, Python, Pitchbook, Refinitiv, and Adobe Illustrator

**Interests:** ATP/WTA Tour, Cricket, Formula 1, Calisthenics, Cooking & Baking, Astronomy, New York Knicks, and J. Cole

# Alice Mihas

+1 224-301-7106 | amihas@college.harvard.edu | www.linkedin.com/in/alice-mihas/

## EDUCATION

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### Harvard University

*Bachelor of Arts | Applied Mathematics*

GPA: 3.64/4.00

- Relevant Coursework: Introduction to Probability, Solving and Optimizing, Integration Series and Differential Equations, Multivariable Calculus, Principle of Economics

**Cambridge, MA**

*May 2027*

### Latin School of Chicago

*High School Diploma | Cum Laude Society*

GPA: 4.16/4.00

- Elected Co-Curricular Prefect Junior and Senior years: one of 5 elected student government positions for all high school activities
- 4x all-state athlete - 2<sup>nd</sup> in discus and 4<sup>th</sup> place in shot-put at Illinois Track & Field State Finals 2023
- Girls Track & Field State Team Champions 2022 (first in school history)
- 2x All-American in the Hammer Throw at New Balance Nationals 2022/2023
- Varsity team member of Tennis (Captain), Track & Field (Captain), Basketball, and Field Hockey
- Awarded Outstanding Senior Athlete of the Year

**Chicago, IL**

*June 2023*

## EXPERIENCE

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### Sycamore Partners

*Incoming Summer Analyst*

- Private equity firm specialized in consumer, distribution, and retail-related investments. The firm has approximately \$10 billion in aggregate committed capital.

**New York, NY**

*June 2025 – August 2025*

### Grand Teton National Park (GTNPF)

*Research Intern*

- Conducted research on various topics including: park accessibility, dark sky initiative, and climate change impact
- Facilitated and hosted park tours with large donors

**Jackson Hole, WY**

*July 2024 – August 2024*

### Latin HS Improvisation Course

*Teacher Assistant*

- Aided in planning and teaching intermediate improv classes for sophomore-seniors in high school

**Chicago, IL**

*August 2022 – December 2022*

## ACTIVITIES

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### Harvard Track & Field

*Varsity Team Member (Recruited Athlete)*

- 20+ hours of practice a week starting from September through May
- Top 10 all-time Harvard athlete in hammer and weight throw events

**Cambridge, MA**

*September 2023 – Present*

### Smart Women Securities

*Investment Team Associate*

- Member of team focused on developing pitch skills, creating models, and researching potential investment opportunities

**Cambridge, MA**

*February 2024 – Present*

### Harvard Financial Analyst Club

*Member*

- Completed a 4-month educational course including a final pitch for the club recruiting process

**Cambridge, MA**

*December 2023 – Present*

### Latin Student Investment Fund

*Board Member (President 2022-2023)*

- Led an eleven-person board managing a \$60,000+ fund in the Latin School's endowment
- Participated in weekly asset management meetings to evaluate and pitch public investment opportunities
- Restructured investment process to improve group participation, investment coverage, and overall efficiency

**Chicago, IL**

*September 2021- June 2023*

### Wolf Judo Club

*Member*

- Represented the U.S. in tournaments from 2016 to 2020, including Junior Pan American Games earning a bronze medal. Competed for team U.S.A. in the Dominican Republic, Peru, Ecuador, Denmark, and Belgium
- Assisted in coaching

**Chicago, IL**

*September 2012-2021*

## ADDITIONAL

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**Language:** Native in English and Conversational in Spanish

**Interests:** Skiing | Climbing (Summited Grand Teton, WY) | Golf | Backpacking | Improv | Concerts | Baking | Country Music

# AMELIE N. LIMA

[LINKEDIN.COM/IN/AMELIE-LIMA-872650276/](https://www.linkedin.com/in/amelie-lima-872650276/) • (310) 383-0334 • [AMELIELIMA@COLLEGE.HARVARD.EDU](mailto:AMELIELIMA@COLLEGE.HARVARD.EDU)

## EDUCATION

**Harvard University** – Cambridge, Massachusetts

**GPA: 3.3/4.0**

B.A. in Economics | Minor in Psychology and Computer Science | ACT: 33

Anticipated Graduation: May 2027

- **Accomplishments:** NCAA Division I Student-Athlete (Women's Volleyball); Harvard HAI Club (Private Equity), HFAC (Harvard Financial Analyst Club), Women in Law, Women in Business, USA National Volleyball Team (indoor and beach), Top Ranked Setter from 2020-2023
- **Relevant Courses:** Intermediate Microeconomics and Macroeconomics, ES-139, Stat 100, Corporate Finance, Introduction to Psychology
- **Wall Street Prep Education by 2025:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

## PROFESSIONAL EXPERIENCE

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

**January 2024 – Present**

- Selected to participate in an exclusive 2-part fellowship designed to prepare under-resourced college athletes for professional success at leading companies, receiving 20+ hours of interview preparation & participating in multiple case competitions with Fortune 50/100/500 companies.

### Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg Pincus's investment strategy (ongoing)**
  - Advising Warburg on the potential acquisition of an 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.
  - Collaborating with a high-impact team of 5 pre-professionals to produce a comparable company analysis, DCF sense check & 5 financial assumptions to forecast key business drivers that will impact our financials.
  - Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team.
- **Performed a competitive analysis on JMI's portfolio company 'Onboard' to understand the firm's artificial intelligence capabilities (closed)**
  - Collaborated with a high-impact team to make a final recommendation to the Make-A-Play team on whether the organization should purchase and implement the "Onboard" software to enhance board efficiency.
  - Conducted extensive research for five weeks to investigate and understand Onboard's sales process and then provide specific recommendations on how to improve it to JMI.
- **Delivered an investment thesis to Morgan Stanley's Fixed Income Team & Managing Director, Stephen Dance (closed)**
  - Achieved role of "scrum master," given to 15 top performers from MAP's fellowship of 1,250+ high achieving college athletes, leading a team of 5 first-year athletes tasked with delivering an investment thesis to MS's Fixed Income team + Managing Director.
  - Crafted a recommendation using a 60/40 split between equity + fixed income for client's retirement portfolio with a total value of \$1M, managing 5+ work streams, including a PESTEL analysis.
- **Co-created an agile transformation approach to introduce a more accessible housing system to Wells Fargo (closed)**
  - Collaborated with a team of high-performing athletes to introduce new processes that improve the housing experience for residents (i.e., enhanced service delivery) to create innovative pathways for upward mobility.
  - Transformed the team's current state analysis into a final 2-page recommendation report to drive implementation of our strategy across the bank, communicating the value of our strategy through a pitch deck/final presentation.
  - Created a roadmap to visually represent the team's multi-year strategy to ~5 stakeholders at Wells Fargo, demonstrating my growing understanding of workforce development & homeownership pathways in 2 slides.

## LEADERSHIP & COMMUNITY DEVELOPMENT

**Harvard University Women's Volleyball** – NCAA Division I Student-Athlete | Cambridge, MA

**August 2023 – Present**

- Assigned roles to first-year students by coordinating with captains, creating a spreadsheet to track tasks, and ensuring each person met tasks.
- Directed a club at my school, encouraging peers to volunteer with the association and participate in the annual volleyball event.
- Assisted with the "special games" event at my school, promoting inclusivity and community involvement.

**Down Syndrome Association Club** – Co-Founder of Club In High School | Mater Dei High School, CA

**August 2020 – May 2023**

- Directed by the club to volunteer at an annual volleyball event and the "special games" event at school.
- Increased support for those with Down syndrome and grew the foundation's volunteer base while developing leadership skills.
- Initiated a tradition of the volleyball team hosting or joining the Halloween event, leading to ongoing student volunteer participation.

**A Place Called Home** – Volunteer | Los Angeles, CA

**April 2018 – June 2021**

- Tutored and cooked for 300+ students over three years, supporting students in their education journey by aiding them in learning how to read and speak English, resulting in several students demonstrating significant improvements in literacy.

**Mater Dei High School Varsity Volleyball** – Captain | Orange County, CA

**August 2019 – November 2019**

- Oversaw first-year tasks by collaborating with other captains and coaches to assign roles to each first-year, discuss details of roles, and create a spreadsheet to ensure each person completed their tasks and fulfilled their role.
- Managed conflict within the team by analyzing scenarios and fostering a communicative environment, resulting in improved team camaraderie.

## NON-TECHNICAL SKILLS & INTERESTS

- **Interests:** Venture Capital, Painting, Reading Novels, Sports, Baking, Learning about old cars, Watching Formula 1, Indy 500, and Le Mans

# AMINATA P. DAVIS

College Address: Brown University | 69 Brown Street, Mail #5853 | Providence, RI 02912 | aminata\_davis@brown.edu  
Permanent Address: 342 East Croydon Park Road | Tucson, AZ 85704 | aminatadavis@gmail.com | 703-241-5818

## OBJECTIVE

Focused and motivated second-year university student pursuing a biology degree and seeking opportunities to gain additional practical, real-world experience in medicine and public health.

## EDUCATION

### Brown University

August 2023 – present  
Providence, RI

#### Division of Biology and Medicine

- B.Sc. Biology student in the Physiology-Biotechnology track (Pre-Medicine and Health)
- 3.50 GPA with coursework in Biology, Chemistry, Mathematics, Physics, and Electives

#### Extracurricular

- Vartan Gregorian Ambassador mentoring students in academics at Gregorian Elementary School
- Project GOAL team member leading outreach and support activities at Central Falls Middle School

### Yorktown High School

August 2019 – June 2023

#### Arlington Public Schools

Arlington, VA

- Advanced Diploma (26 credits including 13 AP courses); State Department of Education Seal of Biliteracy
- 3.96 GPA (4.35 weighted) with coursework in Biology, Chemistry, Mathematics, Physics, and Electives
- College Board AP Scholar with Honor and Indigenous Program Scholar for Excellence in Academic Achievement

#### Extracurricular

- Co-founder and Co-president of the Women in STEM club; Co-president of the French Honor Society
- Chickasaw Nation Honor Club member with Outstanding Academic and Athletic Achievement Awards

## INTERNSHIPS (PAID)

### Leadership Alliance Gateways Summer Research Early Identification Program (SR-EIP)

June – August 2024

#### Weill Cornell Medicine, Rockefeller University, and Memorial Sloan Kettering (Tri-Institutional)

New York, NY

- One of 15 college students selected nationally for the 10-week summer internship program (pre-MD-PhD emphasis)
- Conducted research on DNA replication in Professor Agnes Smogorzewska's Laboratory of Genome Maintenance
- Shadowed Mark Souweidane, MD and observed pediatric neurosurgeries at the New York Presbyterian Hospital
- Presented research at the Leadership Alliance Conference (in Connecticut) and the Gateways Conference (in New York)

### National Institutes of Health Short-Term Experience to Unlock Potential (STEP-UP)

June – August 2022 and 2023

#### University of Maryland Schools of Medicine and Pharmacy

Baltimore, MD

- One of 25 high school students selected nationally for the 9-week summer internship programs (science emphasis)
- Conducted research on iron-bacteria pathogenesis in Professor Amanda Oglesby's Microbiology Laboratory
- Presented research at the National Institutes of Health STEP-UP Conferences (in Maryland)

## INTERNSHIPS (VOLUNTEER)

### Healthcare for Women: Obstetrics and Gynecology

October 2022 – March 2023

#### Virginia Hospital Center Labor and Delivery (Mayo Clinic Network)

Arlington, VA

- Shadowed Bridgett Casadaban, MD at a clinic and hospital; observed examinations, procedures, and births

### Center for Indigenous Health

September 2021 – May 2022

#### Johns Hopkins University Bloomberg School of Public Health

Baltimore, MD

- Tracked the national distribution of 30,000 children's COVID-19 prevention books to Indigenous centers and clinics

## PRESENTATIONS

- "TONSL Localizes RTF2 to the Replication Fork" at the Leadership Alliance SR-EIP Annual National Symposium in Hartford, CT on July 27, 2024 and at the Tri-Institutional Annual Symposium in New York, NY on August 9, 2024
- "Novel Iron Storage Protein Possibly Responsive to Stress in *Pseudomonas Aeruginosa*" at the National Institutes for Health STEP-UP Annual Research Symposium in Bethesda, MD on August 7, 2023
- "Twitching: *Pseudomonas Fluorescens*." at the National Institutes for Health STEP-UP Annual Research Symposium in Bethesda, MD on August 8, 2022

# ANNE YANG

[LINKEDIN PROFILE](#) • (626) 739-8191 • [ANNE\\_YANG@BROWN.EDU](mailto:ANNE_YANG@BROWN.EDU)

## EDUCATION

**Brown University** – Providence, Rhode Island **GPA: 3.7/4.0**  
B.A. in Business Economics and International and Public Affairs | SAT: 1530 Anticipated Graduation: May 2027

- **Relevant Courses:** Intermediate Microeconomics, Intermediate Macroeconomics, Financial Accounting, Econometrics, Foundations of Policy and Governance, and Data, Ethics, and Society
- **Wall Street Prep Education by 2025:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

**Portola High School** – Irvine, California **GPA: 4.5/4.0 Weighted**

- **Accomplishments:** National Merit Commended Scholar; College Board National Rural & Small Town Recognition Program Graduation: 2023

## EXPERIENCE

Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg Pincus's investment strategy (ongoing)**
  - Advising Warburg on the potential acquisition of an 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
  - Collaborating with a high-impact team of 5 pre-professionals to produce a comparable company analysis, DCF sense check & 5 financial assumptions to forecast key business drivers that will impact our financials, submitting a final pitchbook to Warburg
- **Delivered an investment thesis to Morgan Stanley's Fixed Income Team & Managing Director, Stephen Dance (closed)**
  - Achieved role of "scrum master," given to 15 top performers from MAP's fellowship of 1,250+ high achieving college athletes, leading a team of 5 first-year athletes tasked with delivering an investment thesis to MS's Fixed Income team + Managing Director
  - Crafted a recommendation using a 60/40 split between equity + fixed income for client's retirement portfolio with a total value of \$1M, managing 5+ work streams, including a PESTEL analysis

**Zhang Lab (University of California, Irvine)** – Intern | Irvine, CA **June 2024 – August 2024**

- Curated biomedical datasets to enhance public understanding of machine learning
- Acquired proficiency in advanced AI tools, including large language models like ChatGPT
- Engaged in scientific research processes and attended regular lab meetings
- Advocated for AI and STEM education among women through presentation to local students

**Private Tennis Instruction** – Tennis Coach | Irvine, CA **January 2021 – August 2023**

- Coached children aged 10-14 in the sport of tennis, providing tailored instruction and mentorship to foster skill development, sportsmanship, and athleticism, implementing teaching methods and drills to promote progress and improvement within their overall game
- Instructed students on specific tennis techniques in engaging lessons, offering insight into their strokes and promoting the fundamental skills necessary for the sport and adapting the technique for each individual student conducive to personal growth and athletic achievement
- Developed patterns and drills to target the necessary skills and progressions to develop the tennis game of the students, with improvements within the projected goals of the students and competition results

**Yang Fencing Club** – Social Media Manager | Irvine, CA **January 2018 – August 2023**

- Managed a social media platform for a sports club, curating engaging content, increasing follower engagement, and promoting results for increased business by posting competition outcomes and events to enhance the brand visibility and drive membership growth
- Developed comprehensive social media strategies for a sports club on digital platforms and updated followers on information regarding the club, with engagement rising to an increase, promoting the brand and driving member participation

## LEADERSHIP & COMMUNITY DEVELOPMENT

**Brown Women's Tennis** – Student-Athlete Advisory Committee Team Co-Representative | Providence, RI **September 2023 – Present**

- Selected as 2024 Intercollegiate Tennis Association Scholar Athlete: Awarded to athletes that earn above a 3.5 GPA
- Manage a full-time course load with 20 hours per week of on-court training, lifting, competition, and match analysis
- Engaged in monthly conferences, email communication, and in-person meetings
- Collaborated with fellow campus SAAC representatives, student-athletes, and athletics administrators to communicate the student-athlete perspective on related discussion items
- Communicated with fellow team members on concerns, updates, and propositions to serve as a liaison between the student-athlete community and campus SAAC

**Scholars of Finance** – Vice President of Marketing & Outreach | Providence, RI **March 2024 – Present**

- Collaborating with like-minded peers in the Leadership Development Program (LDP) of the Scholars of Finance Brown Chapter, attending 8 weekly discussion-based meetings where a group of peers led by a facilitator worked together to develop the leadership skills of students
- Interacting within leadership and value focused events in the financial realm hosted by Scholars of Finance, engaging in workshops and conferences to broaden understanding of ethical principles and effective leadership strategies and promoting integrity and responsibility
- Managing a social media platform for the university chapter of a national brand, posting consistent content to engage and inform followers of the club's activities and events, driving a rise in prospective student enrollment and current member engagement

## NON-TECHNICAL SKILLS & INTERESTS

**Languages:** English (Native), Mandarin Chinese (Native), Shanghaiese (Native), Spanish (Proficient) - California State Seal of Bilingualism

**Interests:** Tennis, Formula 1, Reading, Baking, Photography, Traveling, Food

# Ashley Wang

New York, NY 10027 | ashley.wang@columbia.edu | 540-684-8112 | www.linkedin.com/in/ashleyliuwang

## EDUCATION

### Columbia University, Columbia College

*Bachelor of Arts in Financial Economics*

**New York, NY**

*Expected May 2027*

- Cumulative GPA: 3.77/4.00 | Major GPA: 3.90/4.00 | Dean's List
- Division I Women's Swim & Dive Team

**Relevant Coursework:** Financial Accounting, Intermediate Macroeconomics, Intermediate Microeconomics, Multivariable Calculus, Calculus-Based Introduction to Statistics

## PROFESSIONAL EXPERIENCE

### Girls Who Invest Summer Intensive Program

*Incoming Scholar*

**Philadelphia, PA**

*June 2025 – August 2025*

- Will complete a 4-week training program led by top business school professors and industry professionals at The Wharton School of the University of Pennsylvania, followed by a 7-week buy-side internship with a leading investment management firm
- Coursework and case studies include accounting, valuation, modeling, Bloomberg Terminal, and asset allocation

### Make-A-Play Foundation Winter Fellowship

*Analyst*

**Remote**

*January 2025 – March 2025*

- Performed due diligence on a healthcare company, building a three-statement model to assess alignment with BofA's 2025 investment strategy, culminating in a final presentation to BofA's executive leadership team
- Selected for Make-A-Play's nine-week winter fellowship for athletes, in partnership with BofA, completing technical and behavioral coursework and weekly mock interviews conducted by Fortune 500 HR professionals

### VAE, Inc.

*Accounting Intern*

**Springfield, VA**

*May 2024 – August 2024*

- Supported AR/AP tasks, including bank statement reconciliations and invoice verifications, ensuring accurate financial records
- Prepared month-end income statement and balance sheet schedules, organizing general ledger data for accurate financial reporting
- Assisted in month-end close process, reconciling balance sheet accounts and completing journal entries to resolve discrepancies

## LEADERSHIP & ACTIVITIES

### Barnard Investment Group

*Analyst/Secretary*

**New York, NY**

*October 2024 – Present*

- Collaborated with 2-4 analysts to value and pitch large-cap equities, presenting investment theses at weekly club meetings
- Monitored daily market news, compiling findings into weekly newsletters distributed to 100+ general body members
- Completed training modules for active members, covering topics including accounting, valuation, modeling, and equity research
- Coordinated and facilitated 10 speaker panels, corporate site visits, and professional workshops per semester, connecting students with industry professionals from firms such as Morgan Stanley, Bank of America, and Goldman Sachs, furthering Barnard Investment Group's mission to increase women's representation in finance

### Columbia Emerging Markets Society

*Analyst*

**New York, NY**

*September 2024 – Present*

- Conducted due diligence on emerging markets in East Asia, presenting articles and findings at weekly meetings to a team of 20+
- Organized 5-10 speaker events per semester, featuring industry professionals from Citi, Goldman Sachs, and other top firms

### Columbia Ignite

*Treasurer/Events Coordinator*

**New York, NY**

*September 2024 – Present*

- Oversaw club's finances by managing a \$1000 budget, maintaining financial records, and preparing year-end financial summaries
- Planned 5-10 educational sessions and workshops per semester, fostering professional development for women at Columbia
- Spearheaded 3-5 community service initiatives per semester, including meal services at soup kitchens, support for domestic violence and homeless shelters, and donations to clothing drives

## ADDITIONAL INFORMATION

**Languages:** English (Native), Mandarin (Conversational Proficiency)

**Activities:** Kappa Phi Lambda Sorority (Academic Chair), Columbia Poker Club, GirlsSpeakUp Nonprofit (Co-founder)

**Interests:** Fashion & Beauty Blogger, NYC Restaurants, Recreational Texas Hold'em, Mahjong, Table Tennis, Open Water Racing

# AVA LEE JUNG

[LINKEDIN.COM/IN/AVA-JUNG-515A64289/](https://www.linkedin.com/in/ava-jung-515a64289/) • (804) 971-0462 • [ALJ72@CORNELL.EDU](mailto:ALJ72@CORNELL.EDU)

## EDUCATION

**Cornell University, SC Johnson College of Business** – Ithaca, New York

**GPA: 3.95/4.0**

B.S. in Hotel Administration with a concentration in Finance

Anticipated Graduation: May 2027

- **Accomplishments:** NCAA Division I Student-Athlete (Soccer), 2023 First Team ECNL Mid-Atlantic All Conference, Douglas S. Freeman High School Top Ten Award
- **Relevant Coursework:** Financial Accounting, Finance, Managerial Accounting, Hospitality Quantitative Analysis, Microeconomics
- **Wall Street Prep Education by 2025:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

## PROFESSIONAL EXPERIENCE

**Apple Hospitality REIT** – *Incoming Asset Management Intern* | Richmond, VA

**June 2025 – August 2025**

- Expected to collaborate with the asset management team to analyze performance metrics for a portfolio of hotels + identify opportunities for revenue enhancement and cost optimization.
- Expected to assist in the preparation of market research reports and properly-level forecasts to support investment decisions.
- Expected to partner with cross-functional teams to enhance operational efficiency and align property performance with company strategies
- Expected to participate in due diligence and valuation processes for potential acquisitions and dispositions.

**Hotel Ezra Cornell** – *HEC 100 Diversity & Inclusion Community Outreach Manager* | Ithaca, NY

**September 2024 – Present**

- Leading a Diversity & Inclusion project aimed at amplifying HEC's impact on guests, speakers, and students.
- Supporting the creation and execution of diverse programming events, facilitating speaker engagement for enriched attendee experiences.
- Managing assigned duties from the Community Outreach + Impact & Inclusion directors, contributing to HEC's community outreach mission.
- Conducting outreach to identify and establish potential collaborations within The Hotel School and Cornell community.

**Country Club of Virginia** – *Server* | Richmond, VA

**June 2024 – August 2024**

- Oversaw 75+ high-volume daily transactions, implementing streamlined checkout processes that boosted customer satisfaction by 15%.
- Conducted hands-on training for 5 team members, enhancing efficiency and reducing checkout time by 20% while maintaining accuracy.
- Partnered with cross-functional teams to oversee service and transactions for 100+ customers daily, achieving consistent accuracy and efficiency.

**Child and Pet Care Services** – *Business Owner* | Richmond, VA

**February 2021 – Present**

- Devised and executed social media and community outreach campaigns, expanding a dedicated client base to 20+ families through local sports and community events.
- Standardized payment processes (cash or Venmo), improving transaction transparency and enhancing satisfaction among clients and employees.

## LEADERSHIP & COMMUNITY DEVELOPMENT

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

**January 2024 – Present**

- Selected to participate in an exclusive 2-part fellowship designed to prepare under-resourced college athletes for professional success at leading companies, receiving 20+ hours of interview preparation & participating in multiple case competitions with Fortune 50/100/500 companies.

Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg Pincus's investment strategy (ongoing)**
  - Selected to lead a small deal team tasked with recommending a new HVAC company to Warburg Pincus, responsible for managing 5 process workstreams, ultimately approving our team's 3-statement model + presenting our final recommendation to senior leaders.
  - Organizing ~2 team discussions per week to ensure 100% compliance with deadlines, developing a 2-page written project plan with SMART goals + a schedule of tasks/milestones for all 5 workstreams, ultimately ensuring we deliver a compelling final presentation.
  - Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team.
- **Performed a competitive analysis on JMI's portfolio company 'Onboard' to understand the firm's artificial intelligence capabilities (closed)**
  - Collaborated with a high-impact team to make a final recommendation to the Make-A-Play team on whether the organization should purchase and implement the "Onboard" software to enhance board efficiency.
  - Conducted extensive research for five weeks to investigate and understand Onboard's sales process and then provide specific recommendations on how to improve it to JMI.

**Cornell University Soccer** – *NCAA Division I Student-Athlete* | Ithaca, New York

**August 2023 – Present**

- Allocate 25+ hours weekly to training, travel, and matches while maintaining a 16-credit course load and part-time employment, strengthening time management and resilience.
- Lead weekly check-ins across team classes, fostering cohesion that boosted team morale by 20%, as shown in post-season surveys.
- Selected as 1 of 75 athletes in the Big Red Leaders 2 Leaders program, developing advanced leadership skills for high-impact teamwork and community outreach.
- Partnering with Ivy League Justice Coalition to drive social justice initiatives, leading educational forums for athletes across Ivy League schools.
- Increasing Cornell Women's Soccer visibility through social media campaigns for Giving Day, while hosting 3 prospective athletes to improve recruitment engagement.

## SKILLS & INTERESTS

- **Technical:** Excel (Advanced), Financial Modeling, Market Analysis, Data Visualization, Agile Project Management.
- **Non-Technical:** Financial Analysis, Strategic Planning, Quantitative Analysis, Leadership
- **Interests:** Sports, Reading, Coaching, Social Media, and Local Volunteering

# Ayesha Eriksrud

eriksrudayesha@gmail.com // 215 452 1396 // [www.linkedin.com/in/ayeshaeriksrud](http://www.linkedin.com/in/ayeshaeriksrud)

## EDUCATION

**University of Pennsylvania, College of Arts and Sciences**, Philadelphia, PA

*Sep 2023 - Dec 2026*

Candidate for Bachelor of Arts : *Majoring in Economics with a minor in Legal Studies and History*

Relevant Coursework : Accounting and Financial Statements, Law and Policy in International Business, Statistics for Economics

**Oslo International School**,

*May 2023*

Recipient of the IB Diploma after taking 4 subjects at Higher level : Economics, English Literature, History and Norwegian. Received the highest scores possible in both Higher Level English and Norwegian.

## RELEVANT EXPERIENCE

**Penn Student Agencies**, Philadelphia

*Chief Executive Officer*

*Jan 2025 – Present*

- Responsible for building and maintaining relationships with stakeholders, strengthening alumni connections, and representing agency and its 80+ employees at high-profile events.
- Will oversee financial performance through ensuring budget alignment and sustainability; drive fundraising and sales initiatives whilst establishing KPI's for all agencies, monitoring progress and updating the Board and University leadership with progress
- Directing the Strategy & Finance functional team, and Co-lead the Marketing & Outreach functional team, and support and advocate for the student leadership team in developing leadership skills that enhance their ability to build and maintain strong relationships with stakeholders, alumni, and partners.

*Managing Director*

*Feb 2024 – Jan 2025*

- Successfully led the most prominent student-run business on campus, generating over \$250,000 in annual revenue and serving more than 100 customers daily
- Acquired comprehensive first-hand experience in business management, through the application of practical skills in strategic planning, financial accounting and management, and stakeholder relationships, through new product development, exploration of innovative marketing techniques, updating of budgets and accounts with real-time expenses and revenues, and coordinating with multiple vendors daily.
- Managed and mentored a team of 10 student workers, demonstrated adaptability and strong problem solving abilities by addressing staffing challenges and handling complex customer inquiries, while organizing monthly development sessions focused on enhancing tangible business skills.

**Warburg Pincus** | *Investment Banking Case Competition*

*Sep 2024 – Present*

- Selected as 1 of 50 second-year athletes to participate in a five-part fellowship designed to prepare URM athletes for careers in banking. Received 20+ hours of virtual instruction in accounting, technical interview preparation & industry-specific training for future banking roles.
- Currently responsible for executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy
- Advising Warburg on the potential acquisition of an 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
- Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team

**Morgan Stanley** | *MAP x Morgan Stanley First-Year Scholar*

*Feb – May 2024*

- Selected for the Make a Play Foundation x Morgan Stanley first-year scholar program.
- Conducted financial analyses, participated in due diligence, developed presentation materials, culmination in a final case competition with the Morgan Stanley Fixed Income Division

**Laburnum AS** | *Investment Analyst, Oslo*

*2020-2023*

- Conducted comprehensive assessments and in-depth analyses of potential investments for a private investment company.
- Provided actionable insights that drove informed decision-making, facilitated the acquisitions of high-performing assets and contributed to growth and profitability of the investment portfolio

## CLUB INVOLVEMENT & SKILLS

**Clubs** : Member of the Penn Athletics Wharton Leadership Academy and *Ambassador* to the Women's Athletic Association.

Wharton Undergraduate Finance Club – *Case Team*, Private Equity & Venture Capital Club, Wharton Investment Trading Group,

Wharton Undergraduate Hedge Fund Club – *Head of Membership Engagement*

**Technical** : Proficient in the Microsoft systems with experience in investment and financial planning softwares. Experience in R-coding.

**Languages** : Native in English and Norwegian. Elementary proficiency in French and Hindi

**Rowing** : Varsity athlete for the Penn women's rowing team, ranked 6<sup>th</sup> in the Country, Ivy League Medalist. National Champion and National team training camp participant

**Interests** : Tennis, Golfing, Piano, Travel and Cooking

# BRAYDEN T. WALKER

[LINKEDIN.COM/IN/BRAYDEN-WALKER-3017222A9/](https://www.linkedin.com/in/brayden-walker-3017222a9/) • (561) 403-3767 • [BW536@CORNELL.EDU](mailto:BW536@CORNELL.EDU)

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## EDUCATION

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**Cornell University** – Ithaca, NY

B.S. in Information Science | Minor in Finance

**GPA: 3.4/4.0**

Anticipated Graduation: May 2027

- Accomplishments: NCAA Division I Student-Athlete (Football)
- Relevant Courses: Microeconomics, Macroeconomics, Statistics
- Wall Street Prep Education by 2025: Accounting Crash Course, Investment Banking Interview Guide & Soft Skills

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## PROFESSIONAL EXPERIENCE

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**WConsulting Management** – Intern | Boca Raton, FL

**May 2024 – August 2024**

- Evaluated potential investment proposals by developing cost v. profit analysis for professional athletes
- Conducted financial analyses providing feasibility for potential deal structures to support athletes with endorsement opportunities
- Developed websites, logos, and product mockups to obtain trademarking rights for high-profile athletes
- Researched and analyzed trends to assist athletes with maintaining consistent brand representation

**Cryptocurrency Investment Group** – Staff & Facilitator | Boca Raton, FL

**December 2021 – May 2023**

- Assisted in the contribution of members acquiring \$1,000,000+ in profit as a collective
- Created daily watchlists for upcoming investments (Cryptocurrencies, Non-fungible Tokens, etc.)
- Diagnosed issues with cryptocurrency-related applications such as wallet optimization and or cryptocurrency application issues, increasing my understanding of complex cryptocurrency-related business problems
- Researched and aggregated multiple blockchain opportunities

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## LEADERSHIP & COMMUNITY DEVELOPMENT

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**Cornell University NCAA Division 1 Football Team** – Student-Athlete | Ithaca, NY

**August 2023 – Present**

- Managing time efficiently between a rigorous course schedule and 32 hours of football activities per week
- Developing myself as a player as well as a person by using constructive criticism from staff and teammates
- Gaining leadership skills by uniting with my diversified team to progress and succeed as one whole unit

**Guggenheim Securities** – Investment Banking Sophomore Focus Program Participant

**February 2025 – February 2025**

- Participated in a two-day series—including information sessions, educational panels, mentor pairing, and networking opportunities—designed to help participants learn more about a career in investment banking at Guggenheim
- Selected as one of only ~60 second-year undergraduates based on personal, academic, and professional leadership potential

**Warburg Pincus Investment Banking Case Competition** – MAP Participant | Remote

**December 2024 – February 2025**

Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy**
  - Collaborated with a small deal team of peers to advise Warburg Pincus on the potential acquisition of a new HVAC company, completing ~20% of the project by performing a comp + building team's income statement
  - Led the "planning phase" workstream, responsible for completing ~5 deliverables (i.e., due diligence for comparable companies, financial assumptions, income statement), sense checking each task to ensure accuracy
  - Performed a comparable company analysis against 3 similarly situated HVAC companies (Hudson Technologies [HDSN], Modine [MOD] and AAON), evaluating ~5 key metrics (i.e., business model, data availability, growth rate geography, size) to determine the enterprise value of our proposed company relative to other industry peers
  - Built my team's income statement in under 1 week, applying the lessons learned from ~5 hours of instruction on Wall Street Prep (Chapter 2: Income Statement) to track our company's revenue, expenses, gains, and losses

**Kingdom Training** – Mentor & Counselor | Fort Lauderdale, Florida

**June 2021 – June 2023**

- Coached kids-teens improving their athleticism as well as basketball skills to reach their goals
- Mentored youth groups to instill habits that will help them succeed on and off the court
- Educated young student-athletes on the importance & benefits of mental resilience along with the importance of academics in relation to athletics

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## ADDITIONAL SKILLS

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- Skills and Language(s): Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development
- Interests: Horology, Real Estate, Investing, Powerlifting, Selling watches and luxury goods

# BRYCE O. THOMAS

South San Francisco, CA • (510) 209-7911 • BRYCE.O.THOMAS.27@DARTMOUTH.EDU • [LINKEDIN.COM/IN/BRYCE-THOMAS-BBA6B6290/](https://www.linkedin.com/in/bryce-thomas-bba6b6290/)

## EDUCATION

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Dartmouth College – Hanover, NH

B.S. in Mathematical Data Science | Minor in Quantitative Social Science

GPA: 3.43/4.0

Anticipated Graduation: June 2027

- **Accomplishments:** Peter Matousek Scholarship Winner, James Scott Miller Jr. 1954 Memorial Scholarship, School Record Holder (Indoor 4x400m), 3rd All Time (60m), 2nd All-Time (200m), Scholars of Finance Member, The Richards Group Athlete of the Week, Published Author/Researcher: The Web of Lives and Voices Behind the Wrangel Island Saga
- **Relevant Courses:** Financial Accounting, Economics, Algorithms, Linear Algebra
- **Industry Education:** 5 Phases of Project Management; Tuck School of Business Finance Program; Agile Framework; Creating Business Presentations 101; Scrum

## EXPERIENCE

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

January 2024 – Present

- Selected to participate in an exclusive 2-part fellowship designed to prepare high-achieving college athletes for professional success at leading companies, receiving 20+ hours of interview preparation & participating in multiple case competitions with Fortune 50/100/500 companies

Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company aligning with Warburg Pincus' 2025 investment strategy (ongoing)**
  - Collaborating with a small deal team of peers to advise Warburg Pincus on the potential acquisition of a new HVAC company, specifically tasked with completing ~20% of the project by performing a comp + building our income statement
  - Performing a comparable company analysis against 3 similarly situated HVAC companies by evaluating ~5 key metrics (i.e., business model, size, growth rate) to determine the enterprise value of our proposed company relative to other industry peers
  - Building my team's income statement in under 1 week, applying the lessons learned from ~5 hours of instruction on Wall Street Prep (Chapter 2: Income Statement) to track our company's revenue, expenses, gains, and losses for up to 5 years
- **Collaborated with a team of 5 athletes tasked with delivering a global Olympic & Paralympic strategy to Deloitte (closed)**
  - Created a buyer persona by illustrating ~5 characteristics (i.e., personal info, challenges, values, common objections) on 1 slide to assess the expectation(s) of target consumers and their value to our plan, helping Deloitte understand their goals + buying patterns
  - Re-engineered the team's workflow process on Air Table by directing discussions for the execution phase to determine the scope of ~5 workstreams (i.e., target persona, "The Hook" Marketing Strategy), resulting in the team completing 50% of our tasks early
- **Delivered an investment thesis to Morgan Stanley's Fixed Income Team & Managing Director, Stephen Dance (closed)**
  - Collaborated with a team of 5 to deliver a \$1M retirement portfolio recommendation to MS's Fixed Income team using a 60/40 equity-fixed income split. Managed 5+ workstreams, including a PESTEL analysis
  - Recommended municipal bonds leveraging demographic analysis for tax advantages, low risk & capital preservation to meet client goals

Keye.co – *Private Equity Startup Intern* | Remote

October 2024 – Present

- Collaborated with the CTO and CPO to refine AI models by incorporating industry specific risks and enhancing the repository of private equity diligence best practices, contributing to strategic product development and scaling
- Engaged alumni networks to strengthen private equity relationships, expand distribution pipelines, and enhance client acquisition..

South San Francisco Housing Authority – *Intern* | South San Francisco, CA

June 2024 – August 2024

- Collaborated with Mayor James Hsuchen Coleman on housing initiatives to increase ecological sustainability, helping to reduce carbon emissions through improved utilities, gardening, and sanitation management
- Proposed new strategies to extend services to marginalized communities, enhancing diversity in housing applications while addressing various housing challenges
- Utilized Microsoft Excel and state/municipal CRM software to manage budgets, streamline finances, and optimize resource allocation

## LEADERSHIP & COMMUNITY DEVELOPMENT

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Dartmouth Track & Field Team – NCAA Division I Student-Athlete | Hanover, NH

September 2023 – Present

- Actively facilitated weekly strategy meetings with the track team, focused on setting and reviewing achievable goals and priorities; this strategic approach directly contributed to a significant increase in overall team performance and 3 school records broken.
- Enhanced team morale and performance by mentoring peers and incoming recruits in form and technique

Moreau Catholic High School – Associate Student Body Activities Commissioner | Hayward, CA

March 2022 – May 2023

- Supervised and collaborated with all class Rally Committee Officers, managing and administering the activities of various working committees; this involved strategic oversight, team leadership, and ensuring effective execution of committee objectives
- Produced comprehensive and accurate reports detailing project activities, adhering to strict timelines
- Facilitated Leadership Retreats, playing a key role in their successful execution; maintained strong, effective working relationships with fellow Activities Commissioners and Rally Committee Officers, contributing to a cohesive and productive team dynamic

The Refugee Project – Project Manager | Fremont/Hayward, CA

March 2022 – May 2023

- Led impactful student-run fundraising initiatives, accruing over \$2000, and directed these funds toward equipping refugee children with essential educational materials like backpacks, school supplies, and laptops, in partnership with the SAAHIL foundation
- Managed clothing deliveries, organizing and strategically arranging apparel for children and households
- Collaborated closely with the Operations Coordinator, diligently gathering and managing finances, set goals, and planned logistics for projects; maintained strong communication, enhancing project productivity and achieving a 7% increase in operational efficiency

## NON-TECHNICAL SKILLS & INTERESTS

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- **Interests:** Music, theatre, film & television, acting

# Chandler A. Dicks

[LINKEDIN PROFILE](#) • 203-859-8347 • [cdicks.cd22@gmail.com](mailto:cdicks.cd22@gmail.com)

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## EDUCATION

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- College of the Holy Cross – Worcester, Mass** **GPA: 3.9**
- B.A. in Economics & Spanish | Pursuing a Certificate of Business | SAT: 1300 | Graduation Year: 2027
  - Accomplishments: HC Dean's List (2023), Deerfield Academy Cum Laude (2020-23), DA Long Jump Record (23')
  - Relevant Courses: Micro & Macro Economics, Fullbridge Professional Edge, & Various Excel Formatting Courses
  - Wall Street Prep Education by 2025: Accounting Crash Course, Investment Banking Interview Guide, & Soft Skills

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## PROFESSIONAL EXPERIENCE

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- D&D Construction Services – Laborer** | Bridgeport, CT **08/2021 – Present**
- Removed and replaced 100 feet of sidewalks in the eastern Fairfield County of Connecticut for the opening of the newly renovated Thomas Merton Family Center located on State Street.
  - Gained proficiency in operating specialized construction machinery, including backhoes, dump trucks, and rollers, to maximize efficiency and productivity when working independently on job sites.
- Holy Cross Resident Assistant – Worker** | Worcester, MA **08/2024 – Present**
- Hosted a plethora of building-wide programs to improve first-year residents' personal development, relationships, & will to positively impact the community
  - Provided guidance and resources to residents facing academic and personal challenges, serving as a liaison between campus services and my 30+ residents
  - Enforced community guidelines and professionally mediated conflict, maintaining a safe and respectful environment regardless of color, ethnicity & religion
- Woodbridge Park & Rec Lifeguard – Worker** | Woodbridge, CT **05/2021 – 08/2021**
- Ensured the safety of all patrons during the kids' camps in the mornings and senior swims during the evenings
  - Educated adolescent swimmers on water safety practices and preventative measures, fostering a safe & informed environment for all while also proactively addressing potential hazards to minimize risk & injury
  - Assisted with daily pool maintenance and setup, ensuring a clean and welcoming facility for all guests by maintaining compliance with health & safety standards

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## LEADERSHIP & COMMUNITY DEVELOPMENT

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- Warburg Pincus Investment Banking Case Competition – Scrum Master** | New York, NY (Remote) **12/2024 – Present**
- Selected Case Experience:
- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy**
    - Advising Warburg on the potential acquisition of an HVAC company, approving the design of a 3-Statement Model used to forecast the team's income statement, balance sheet & cash flow statement for up to 5 years
    - Selected to lead a small deal team tasked with recommending a new HVAC company to Warburg Pincus, responsible for managing 5+ process workstreams, ultimately approving our team's 3-statement model + presenting our final recommendation to senior leaders
    - Organizing ~2 team discussions per week to ensure 100% compliance with deadlines, developing a 2-page written project plan with SMART goals + a schedule of tasks/milestones for all 5 workstreams, ultimately ensuring we deliver a compelling final presentation
- Make A Play Foundation (MAP) – Diamond League Fellow (Fall '24)** | Remote | Rating: Very Strong **09/2024 – 11/2024**
- Participated in a 2-part fellowship for second-year college athletes from under-resourced backgrounds looking to prepare for success in financial services, completing 3 modules on interview preparation and business communications
  - Competed in 3 group mock interviews against 50+ other college athletes, receiving a 'very strong' rating in at least 2 of the interviews, advancing to Phase 2 of the fellowship ("the team competition") with Warburg's Human Capital Team
- HC's Inclusive Excellence Plan – Member** | Worcester, MA **03/2024– 05/2024**
- Selected as a member of a DEI committee which remodeled and composed a plan highlighting five prominent methods in which Holy Cross could implement a new and improved DEI plan on campus.
  - As a member of the Infrastructure group, students and administrators alike collaborated to develop initiatives to enhance diversity and inclusion among the student population, such as organizing various DEI events, hosting diverse motivational speakers, and even offering food trucks

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## ADDITIONAL SKILLS

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- Skills: Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development I
- Strengths: Leadership | Competent in Spanish | Committed
- Programs: HC MOCA x WOCA, HC Dean's List (2023), Deerfield Academy Cum Laude Society (2020-23)
- Interests: Movies | Gardening | Music | Reading

# CHEYLA P. WILLIAMS

[LINKEDIN.COM/IN/CHEYLA-WILLIAMS-9A34232B1/](https://www.linkedin.com/in/CHEYLA-WILLIAMS-9A34232B1/) • (347) 452-1136 • [WILLIACP@LAFAYETTE.EDU](mailto:WILLIACP@LAFAYETTE.EDU)

## EDUCATION

Lafayette College – Easton, PA

GPA: 3.4/4.0

B.A. in Economics | Minor in Government & Law

Anticipated Graduation: May 2027

- **Accomplishments:** NCAA Division I Student-Athlete (Lafayette College Varsity Track & Field)
- **Relevant Courses:** Economics, Differential Calculus & Economic Modeling, Government & Law 101, Rise of Individuals & Human Experience, World Religion
- **Wall Street Prep Education by 2025:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

## EXPERIENCE

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

January 2024 – Present

- Selected to participate in an exclusive 2-part fellowship designed to prepare high-achieving college athletes for professional success at leading companies, receiving 20+ hours of interview preparation & participating in multiple case competitions with Fortune 50/100/500 companies

Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg Pincus's investment strategy (ongoing)**
  - Collaborating with a small deal team to advise Warburg on the potential acquisition of a new HVAC company, completing ~20% of the project by leading the “planning phase” workstream + co-authoring our investment memorandum that we present to the Human Capital Team in February
  - Executing ~5 deliverables (i.e., due diligence for comparable companies, financial assumptions, income statement) in under 1 week, sense checking each task to check the reasonableness of our assumptions+ resulting outputs and ensure an accurate company valuation
  - Performing a comp. against 3 similarly situated HVAC companies (i.e., Limbach Holdings. Inc., Comfort Systems USA, Inc., AAON Inc.), evaluating ~5 key metrics (i.e., business model, data availability, growth rate geography, size, service(s)) to determine the enterprise value of our company
- **Delivered an investment thesis to Morgan Stanley's Fixed Income Team & Managing Director, Stephen Dance (closed)**
  - Achieved role of “scrum master,” given to 15 top performers from MAP's fellowship of 1,250+ high achieving college athletes, leading a team of 5 first-year athletes tasked with delivering an investment thesis to MS's Fixed Income team + Managing Director
  - Crafted a recommendation using a 60/40 split between equity + fixed income for client's retirement portfolio with a total value of \$1M, managing 5+ work streams, including a PESTEL analysis
- **Co-created an agile transformation approach to introduce a more accessible housing system to Wells Fargo (closed)**
  - Collaborated with a team of high-performing athletes to introduce new processes that improve the housing experience for residents (i.e., enhanced service delivery) to create innovative pathways for upward mobility
  - Conducted a performance benchmarking analysis on 3 of Wells' competitors in the affordable housing space, evaluating 5+ financial metrics (i.e., business model, size, growth rate, data availability, geography) to identify best practices that have worked for other banks
  - Created a zero-based budget to advise Wells on how it should deploy its budget across three tiers (~30% - \$6M in Tier 1 | ~40% - \$8M in Tier 2 | ~30% - \$6M in Tier 3), applying a S.M.A.R.T. framework to ensure expenses were specific, measurable, achievable, relevant, and timely

Basil Yoga – Instructor | Ridgefield, CT

May 2023 – June 2023

- Hosted yoga classes and guided everyone through breathing techniques and intricate movements, attracting a younger, more vibrant crowd
- Organized check-in and check-out process in studio as well as class reservations, which created an organized experience for customers
- Planned social gatherings, workshops, and retreats where students can connect with each other outside of regular classes which helped build relationships, create a sense of belonging, and strengthen community bonds between studio members

Court Street Dental – Apprentice | Brooklyn, NY

July 2021 – August 2021

- Examined various dental procedures and techniques by assisting a professional dentist, gaining a comprehensive understanding of the field
- Strengthened my understanding of dental procedures and tool handling, allowing the dentist to focus on providing quality care to patients and ensuring a smooth workflow in the office

## LEADERSHIP & COMMUNITY DEVELOPMENT

Lafayette Track and Field Team – NCAA Division I Student-Athlete | Easton, PA

August 2023 – Present

- Influenced two first-year track athletes to schedule appointments with the sports psychologist and sports nutritionist for guidance dealing with academic and athletic balance, dietary habits, and schedule management to foster a supportive track team that values athlete wellbeing
- Hosted three high school students on daytime tours to inform them of the expectations and demands of a D1 track athlete and enhance their potential in the recruiting process, contributing to two new additions to Lafayette College's Class of 2028 D1 Track athletes
- Advertised a women's sports survey to female athletes for advice and constructive criticism about Lafayette College's Athletic Department's contribution to the athletic environment and community in which generated a total of 128 responses

Ridgefield High School Girls Track and Field Team – Captain | Ridgefield, CT

August 2022 – June 2023

- Trained newer or younger potential team members adjust to the throwing events, providing advice on technique or strategy, and offering emotional support when needed, resulting in 65% of tryout athletes making the throws team
- Led warm-ups, cool-downs and workouts serving as a liaison between the team and the coaching staff when it comes to practice, fostering a sense of unity and teamwork among their teammates
- Communicated important information, such as practice schedules, strategy, and game plans, while also relaying any concerns or suggestions from the team to the coaches, which created a positive team environment where individuals were comfortable sharing concerns

Lodestar – Magazine Editor | Ridgefield, CT

November 2022 – May 2023

- Managed and reviewed submissions of various works such as poetry, essays, and short shorts to create a clear, coherent, thematic magazine
- Coordinated weekly meetings for members of the club to attend to sort through the many pieces of art and come to a decision, ensuring that members are on the same page, understands their roles, and can coordinate their efforts effectively for the magazine
- Advertised the Lodestar magazine to the public eye including the high school and outside by tailoring the messaging and visuals to resonate with the interests and preferences of your target readers to create a stronger connection and increase the likelihood of engagement

Diversity Book Club – Founder | Ridgefield, CT

September 2022 – May 2023

- Organized monthly meetings, coordinating schedules, and facilitating discussions to create a sense of reliability for the members
- Planned book-related events and activities alongside the book club, such as workshops, book drives and community outreach programs to benefit the community and enhances the club's visibility and reputation

## NON-TECHNICAL SKILLS & INTERESTS

- **Interests:** Financial literacy, American politics and Behavioral, Environmental, and Financial Economics.

# CHRISTA C. KAY

Haverford, PA 19041 | (484) 547-2630 | cck76@cornell.edu | linkedin.com/in/christa-kay

## EDUCATION

**Cornell SC Johnson College of Business** **Ithaca, NY**  
**Charles H. Dyson School of Applied Economics and Management** *Anticipated Graduation May 2027*  
*Candidate for Bachelor of Science in Applied Economics and Management* GPA: 3.9

Concentration: Finance & Entrepreneurship

Relevant Coursework: Financial Accounting, Business Statistics, Calculus 1, Managerial Economics

**The Baldwin School**

GPA: 4.0; ACT: 36

**Bryn Mawr, PA**

*September 2009 – June 2023*

## RELEVANT EXPERIENCE

**Relay Network**

**Radnor, PA**

*Technology Intern*

*June 2024 – August 2024*

- Rotated through Finance, Marketing, Cybersecurity, and Product departments under mentorship of Chief Innovation Officer
- Leveraged prompt engineering in Amazon S3 and Bedrock platforms to design and implement 50+ generative AI models
- Optimized the prospect research process for the Sales team with final AI model, increasing the efficiency of lead conversion

**Stifel Financial Corporation (Stifel, Nicolaus & Co.)**

**Conshohocken, PA**

*Investment Management Summer Analyst*

*June 2023 – July 2023*

- Supported the Institutional Equity Group with processing research across sectors including TMT, food/beverage, and retail
- Assisted with client and prospect communications regarding firm capabilities, new product solutions, and compliance matters
- Utilized fundamental and technical analysis to guide tactical and strategic decisions on portfolio rebalancing for clients

**Endurance Real Estate Group LLC**

**Radnor, PA**

*Asset and Property Management Intern*

*April 2023 – May 2023*

- Reviewed and standardized certificates of insurance for 250+ tenants of a vertically integrated investment firm (AUM of \$1BN)
- Proposed AI software such as Northspyre to enhance property management including streamlining communication with tenants
- Promoted tech-enabled energy saving initiatives within each property while thoroughly assessing associated costs and risks

## LEADERSHIP & CAMPUS INVOLVEMENT

**Cornell University Women's Varsity Squash**

**Ithaca, NY**

*Varsity Athlete and Club Coach*

*August 2023 – Present*

- Compete at the 4/5 position on a Division I sports team, devoting ~30 hours per week to contribute to a top eight national finish
- Training as member of the Italian National Squash Team for World Championships and Los Angeles 2028 Olympics
- Coach Cornell's club team, designing and leading court sessions and guiding team to victory at National Club Championships

**Cornell Dyson Leadership Fellowship Program**

**Ithaca, NY**

*Fellow*

*September 2024 – Present*

- Selected as one of only 23 sophomores to participate in a prestigious three-year experiential leadership development program
- Attending immersive workshops, 1:1 professional coaching, and completing specific coursework and reflection assignments
- Participate in a team project for the international Map the System competition hosted by the University of Oxford

**Cornell SC Johnson College of Business**

**Ithaca, NY**

*Teacher's Assistant for Introductory Statistics*

*August 2024 – Present*

- Designated to lead a weekly 2-hour section for 20 students, independently teaching and clarifying complex statistical concepts
- Provide in-depth explanations and reinforcing statistical principles by guiding students through comprehensive work packets
- Evaluate and grade student assignments and hold regular office hours to offer additional support and provide detailed feedback

**Warburg Pincus and Make-A-Play Investment Banking Case Competition**

**Remote**

*Fellow*

*Expected September 2024*

- Participating in an exclusive 2-part fellowship designed to prepare high-achieving college athletes for careers in banking
- Advising Warburg Pincus on the potential acquisition of an HVAC company, approving the design of a 3-Statement Model
- Collaborating with a high-impact team of 5 pre-professionals to produce a comparable company analysis & DCF sense check

**Morgan Stanley and Make-A-Play Foundation**

**New York City, NY**

*Finalist, Fixed Income Competition*

*January 2024 – May 2024*

- Collaborated in a team with other collegiate student-athletes to develop a retirement plan for Marvin Ellison, CEO of Lowe's
- Incorporated municipal and agency bonds, REITs, and other investment vehicles, while analyzing current market conditions
- Selected as a finalist to present the portfolio at Morgan Stanley Headquarters in New York to the Fixed Income Division

## AWARDS, SKILLS, AND INTERESTS

- **Awards:** Morgan Stanley Fixed Income Competition Finalist (2024), Candidate for U.S. Presidential Scholars Program (2023)
- **Skills:** Microsoft Office, Spanish (Conversational), Amazon Web Services (Amazon Bedrock and S3), Canva
- **Interests:** Pickleball, Sudoku, Doubles Tennis, Skiing/Snowboarding, Volunteering, Traveling, Backgammon

# DANIEL KONG

[LINKEDIN.COM/IN/DANIEL-KONG-3A6827280/](https://www.linkedin.com/in/daniel-kong-3a6827280/) • (631) 951-8990 • [DANIELKONG0603@GMAIL.COM](mailto:DANIELKONG0603@GMAIL.COM)

## EDUCATION

**Carnegie Mellon University** – Pittsburgh, PA

**GPA: 3.6/4.0**

B.A. in Business Administration | Minor in Entrepreneurship | SAT: 1500

Anticipated Graduation: 2027

- Accomplishments: NCAA Division III Student-Athlete (Carnegie Mellon Varsity Tennis)
- Relevant Courses: Accounting, Microeconomics, Macroeconomics, Corporate Finance, Investment Analysis
- Industry Education by Spring 2024: 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

## EXPERIENCE

**Morgan Stanley** – *Fixed Income Student Analyst; Scrum Master* | New York, NY (Remote)

**March 2024 – Present**

- Achieved the role of “scrum master,” given to 15 top performers from MAP’s fellowship of 1,250+ high-achieving college athletes, leading a team of 5 first-year athletes tasked with delivering an investment thesis to MS’s Fixed Income team + Managing Director, Stephen Dance

**Wells Fargo** – *Housing Affordability Student Analyst; Scrum Master* | New York, NY (Remote)

**February 2024 – March 2024**

- Achieved the role of “scrum master,” given to 30 top performers from MAP’s fellowship of 1,250+ high-achieving college athletes, tasked with managing a team of 5 responsible for developing a strategy to expand affordable rental housing opportunities in URM communities
- 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 Wells’ leadership team in March to formally close the project & transfer our solution(s)
- Directed weekly discussions with my team to determine the scope of ~10 workstreams (i.e., balanced scorecard, feasibility study, buyer persona, marketing strategy, benchmarking analysis, budget, user journey map), resulting in a 40% faster turnaround process for the team

**Jiababa** – Manager | Pittsburgh, PA

**December 2023 – January 2024**

- Controlled daily operations for a student run bakery, managing dozens of orders while engaging with customers at the cash register
- Delegated tasks to other employees, leading to an increase in overall efficiency and a consolidation of operations

**STARUP By INSEAD** – *Summer Entrepreneur* | Fontainebleau, France

**July 2021 – August 2021**

- Spearheaded development of startup and collaborated with other senior entrepreneurs to create a compelling business model for a startup by conducting financial research and analyzing market trends
- Increased potential investor interest by 50% through pitch derived from marginal analysis

**Harvard Student Agencies** – *Summer Consultant* | Boston, MA

**July 2021 – August 2021**

- Coordinated with group members to reorganize data and present market findings to Harvard Student Agencies board members
- Conducted market research on students at Harvard through income distribution and financial analysis, creating data-driven models which were employed in a final deliverable for the Harvard Shop and the Coop
- Utilized SWOT analysis to assess and identify strategies for current and upcoming marketing opportunities

## LEADERSHIP & COMMUNITY DEVELOPMENT

**Make A Play Foundation (MAP)** – NXT Fellow ’23 (Winter Cohort) | Remote

**December 2023 – Present**

- Selected as 1 of 100 college athletes to participate in a fellowship that prepares first-year under resourced athletes for professional success
- Receive 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](#)

**Asian Students Association** – Financial Committee Member | Pittsburgh, PA

**October 2023 – Present**

- Created team of driven, innovative individuals to initiate management of finances of CMU’s premier social club
- Raised more than \$6000 in revenue for CMU’s Giving Day through various fundraising events and activities
- Established campus-wide marketing strategies to improve and widen reach for the club across the greater Pittsburgh area, leading to more student engagement and more frequent intercollegiate social events

**Carnegie Mellon Tennis Team** – NCAA Division III Student-Athlete | Pittsburgh, PA

**August 2023 – Present**

- Balance a full 40 hour/week academic workload, 20+ hour/week athletic schedule, and extracurricular obligations, leading to a 3.5+ GPA and a guaranteed starting position in the singles and doubles lineup every match
- Analyzed 25+ hours of recorded match footage from tournaments and invitationals with team members individually, discussing areas of improvement and creating a personalized training plan to be utilized in practiced for every teammate
- Demonstrate leadership amongst the freshman on the team, resulting in an increase in overall cooperation and heightened team spirit

**Private Tennis Coach** – Coach | Brookville, NY

**July 2022 – Present**

- Coach and instruct over 10 clients on a weekly basis and increased overall client base by 60% in 2023
- Administer series of training drills and exercises for clients that led to improvements in skills and stronger performances in tournaments

## NON-TECHNICAL SKILLS & INTERESTS

- Interests: Golf, soccer, poker, film, exploring new food, music, traveling (I have been to Albania and Montenegro for Tennis tournaments)

# DONTE T. WOFFORD

[LINKEDIN PROFILE](#) • 346 339 4071 • [DONTE.T.WOFFORD.27@DARTMOUTH.EDU](mailto:DONTE.T.WOFFORD.27@DARTMOUTH.EDU)

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## EDUCATION

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**Dartmouth College** – Hanover, NH **GPA: 3.1/4.0**  
B.A. in Economics | ACT/SAT: 31 Graduation Year: 2027

- Relevant Courses: Calculus, Expository Writing, Statistics

The Tuck School of Business – Hanover, NH  
Tuck Business Bridge Program

- Accomplishments: leveraged mathematical data science expertise to conduct financial analysis and DCF valuation of *Ralph Lauren* for the capstone project.
- Relevant Courses: Spreadsheet Modeling, Financial Accounting, Managerial Economics

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## PROFESSIONAL EXPERIENCE

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**AaronBux Wealth Management** – *Private Banking Intern* | Hanover, NH **01/2025 – Present**

- Supported business development initiatives and assisted in client acquisition through market research, outreach, and relationship management.
- Assisting with investment strategies across traditional and alternative assets.

**Dartmouth College** – *Fysep Residential Fellow* | Hanover, NH **08/2024 – 09/2024**

- Participated in a four-week program supporting 80+ incoming first-year students from marginalized backgrounds through mentorship, academic preparation, and community-building initiatives
- Designed detailed schedules, led peer discussions, and facilitated engagement in college-sponsored events
- Fostered mentorship by actively guiding students, addressing concerns, and creating a welcoming, supportive environment

**Deep** – *Marketing Manager* | Hanover, NH **08/2024 – 09/2024**

- Developed and implemented tailored strategies to boost engagement and audience growth for a social media start-up
- Coordinated and led on-campus pop-ups and company events, effectively engaging students and promoting brand awareness.
- Managed content creation and campaign scheduling

**Galena Park Independent School District** – *Business Intern* | Hanover, NH **08/2024 – 09/2024**

- Balanced district accounts for over 15 schools and maintained precise records
- Organized and digitized 10+ years of archival documents
- Conducted audits and maintained precise records

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## LEADERSHIP & COMMUNITY DEVELOPMENT

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**Bank of America Investment Banking Case Competition** – *MAP Phase 2 Fellow* | Remote **02/2025 – Present**  
Selected Case Experience:

- *Executing a valuation analysis of an emerging healthcare company to help BofA advise a PE firm on a new acquisition (ongoing)*
  - Collaborating with a small deal team of peers to advise a PE firm on the potential acquisition of a new healthcare company, managing 5+ workstreams collectively to submit a 10-page CIM + deliver a management presentation.
  - Co-designing a 3-statement model to forecast the company's income statement/balance sheet/cash flow statement for up to 5 years, simultaneously researching key healthcare trends to clearly articulate its positioning.
  - Adhering to the 5 phases of project management (i.e., initiation, planning, execution, monitoring, closure) to ensure every aspect of the project is methodically addressed within our 6-week timeframe, minimizing bottlenecks and keeping the project moving forward.

**Galena Park Independent School District** – *Lead Mentor* | Houston, TX **08/2023 – 06/2023**

- Supported over 100 students in the University application process through essay writing, financial aid, and ultimately school selection
- Organized workshops and provided one-on-one mentorship
- Developed leadership and communication skills through active mentoring and collaboration with students and staff

**Black Ivy League Business Conference** – *Participant* | Philadelphia, PA **08/2023 – 08/2023**

- Participated in a two-day, in-person business conference for students of color at Ivy League institutions
- Attended workshops led by finance professionals
- Engaged in industry led discussions to gain insight into current trends in both banking and investments

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## ADDITIONAL SKILLS

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- Skills and Language(s): English (Fluent), Communication, Data Input, Marketing, Adaptability, Spreadsheet Modeling
- Programs: Python (Beginner)
- Interests: Rugby, Football, Nature, Music, Writing

# DOROTHY YAO

[LINKEDIN.COM/IN/DOROTHY-YAO-324082287](https://www.linkedin.com/in/dorothy-yao-324082287) • (973) 615-5578 • [DOROTHYYAO@PRINCETON.EDU](mailto:DOROTHYYAO@PRINCETON.EDU)

## EDUCATION

Princeton University – Princeton, NJ

GPA: 3.85/4.0

A.B. in Economics

Anticipated Graduation: Spring 2027

- Accomplishments: NCAA Division I Student-Athlete (Varsity Lightweight Women's Rowing); Princeton Women in Economics and Policy (Member); DiStac Dance Company (Member & Business Chair); Mountain Lakes High School (Valedictorian)
- Relevant Courses: Financial Investments; Microeconomic Theory: A Mathematical Approach, Linear Algebra; Algorithms and Data Structures; Computer Science: An Interdisciplinary Approach; Multivariable Calculus
- Wall Street Prep Education by 2025: Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

## PROFESSIONAL EXPERIENCE

Girls With Impact – *Business Development Intern* | Greenwich, CT

June 2024 – August 2024

- Researched and recommended potential corporate partnerships that resulted in successful sponsorships
- Negotiated contracts with partners and analyzed data from partnerships and programming
- Developed financial strategies for corporate sponsorships, leading to increased funding and program sustainability
- Led communications with corporate partners, students, alumni, and mentors
- Recorded and planned budgeting, spending, and revenue for marketing and recruitment
- Prepared detailed financial reports using Salesforce to guide strategic decisions and optimize resource allocation
- Designed digital marketing materials including social media posts and newsletters
- Planned strategic timeline for marketing releases

New Jersey Institute of Technology – *Research Intern* | Newark, NJ

June 2021 – January 2023

- Collected and analyzed the sentiments of thousands of Amazon customer reviews through implementing machine learning algorithms
- Identified sentiments of reviews manually and compared them with AI-generated sentiment analysis, charting results for a doctoral candidate
- Engaged in independent research and compiled new findings in paper presented at conference

## LEADERSHIP & COMMUNITY DEVELOPMENT

Warburg Pincus Investment Banking Case Competition – *MAP Participant* | New York, NY (Remote)

December 2024 – Present

Selected Case Experience:

- *Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy (ongoing)*
  - Advising Warburg on the potential acquisition of an 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
  - Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team

Make A Play Foundation (MAP) – *Diamond League Fellow (Fall '24)* | Remote | Rating: Very Strong

September 2024 – December 2024

- Participated in a 2-part fellowship for second-year college athletes from high-achieving backgrounds looking to prepare for success in the financial services industry, completing 3 modules on interview preparation and business communications
- Competed in 3 group mock interviews against 50+ other college athletes, receiving a 'very strong' rating in at least 2 of the interviews, advancing to Phase 2 of the fellowship ("the team competition") with Warburg Pincus's Human Capital Team

Tiger Consulting Club – *Consulting* | Princeton, NJ

January 2024 – Present

- Work with various companies to analyze data and identify trends to recommend solutions
- Developed financial strategies and provided data-driven solutions to improve client profitability for Earth Brands
- Write case studies and compete in consulting competitions

Princeton Varsity Lightweight Women's Rowing – *Coxswain* | Princeton, NJ

September 2023 – Present

- Practice with team 2-3 hours each day, 6 days a week
- Lead and manage training and workouts; motivate the team; record times and organize records
- 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

## NON-TECHNICAL SKILLS & INTERESTS

- Skills and Language(s): English, Mandarin, Spanish (Working Proficiency)
- Technical: Java, Microsoft Excel (Financial Modeling), Salesforce (CRM data analysis tool), Python, Word, PowerPoint

# ELLA C. UTSCHIG

[LINKEDIN.COM/IN/ELLA-UTSCHIG-219334277/](https://www.linkedin.com/in/ella-utschig-219334277/) • (203) 564-3635 • [EUTSCHIG@SAS.UPENN.EDU](mailto:EUTSCHIG@SAS.UPENN.EDU)

## EDUCATION

University of Pennsylvania – Philadelphia, PA

GPA: 3.82/4.0

B.A. in Economics, Minor Consumer Psychology (Wharton)

Anticipated Graduation: May 2027

- **Accomplishments:** NCAA Division 1 Student-Athlete (Penn Varsity Softball), Wharton Leadership Academy, NFCA All-American Scholar Athlete
- **Relevant Courses:** Microeconomics, History of American Law, Law and Economics, Business Statistics, Macroeconomics, Marketing, Math 1080
- **Industry Education by Spring 2024:** 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

## EXPERIENCE

Oliver Wyman – MAP Women's Initiative Network Fellow | New York, NY (Remote)

September 2024 – Present

- Selected as 1 of 50 sophomores to participate in a fellowship designed to prepare women athletes for careers in banking and consulting.
- Refine problem solving skills by participating in a case competition sponsored by Oliver Wyman's Campus Recruiting & Diversity Teams.
- Received 20+ hours of targeted case interviews prep, professional development coaching & industry-specific training for consulting roles

Morgan Stanley – Fixed Income Student Analyst; Planning Phase Owner | New York, NY (Remote)

March 2024 – June 2024

- Collaborating with a team of 5 to deliver a recommendation to MS's Fixed Income team + MD Stephen Dance using a 60/40 split between equity + fixed income for a client's retirement portfolio with a total value of \$1M, managing 5+ workstreams including a PESTEL analysis
- 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

Wells Fargo – Housing Affordability Student Analyst | New York, NY (Remote)

January 2024 – March 2024

- Collaborated with a team of 5 to deliver an affordable housing strategy to the bank to expand affordable rental housing opportunities in URM communities, spearheading the creation of a balanced scorecard to visualize how my team's strategy can drive day-to-day priorities
- Led workstream to transform my team's project charter into a 2-page recommendation report, analyzing/weighting 5+ potential options to deliver a final recommendation that Wells' leaders can confidently follow + offer a conclusion on how they can implement our plan
- Re-engineered the team's workflow process on Air Table by directing discussions for the planning phase to determine the scope of ~5 workstreams (i.e., balanced scorecard, feasibility study, recommendation), resulting in the team completing 50% of tasks ahead of schedule

Ella Utschig Fastpitch – Coach | White Plains, NY

August 2021 – Present

- Founded a softball coaching business that has steadily increased by 30% each summer focused on individualized player growth and personalized instruction
- Co-hosted a pitching camp with the head of the White Plains Little League to help cultivate young players' skills and attract more business
- Leveraged a corporate partnership with Rob Crews to improve coaching accuracy using hitting sensors

A-Game Sports - Coach | New Rochelle, NY

May 2024 – August 2024

- Was hired as the sole pitching instructor in the facility

## LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – NXT Fellow '23 (Winter Cohort) | Remote

December 2023 – Present

- Selected as 1 of 100 college athletes to participate in a fellowship that prepares first-year under resourced athletes for professional success
- Receive 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
- Collaborating with a team of 6 to develop a multi-year strategy for Wells Fargo's 2024-25 Housing Affordability Breakthrough Challenge
  - Technical Skills Acquired: [Agile Project Management](#) | [Scrum Methodology](#) | [Tuckman's 5 Stages of Group Development](#)

University of Pennsylvania Softball Team – NCAA Division I Student-Athlete | Philadelphia, PA

August 2023 – 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
- Joined Penn Athletics Leadership Academy, learning to work with local & national leaders to learn how to grow their team on/off the field

Wharton Leadership Academy – Participant | Philadelphia, PA

September 2023 – Present

- 4-Year Program through the University of Pennsylvania Athletic Department
- Monthly leadership training where student athletes work with local and national leaders to learn how to grow within a team, on the field, and in the classroom.
- Acknowledgement and improvement on personality strengths and opportunities

White Plains Little League - Volunteer Coach | White Plains, NY

November 2022 – August 2024

- Instructed elementary school children in groups of up to 15 children, implementing personalized training plans to enhance player performance

## NON-TECHNICAL SKILLS & INTERESTS

- **Skills:** Microsoft Office, Google Workspace, Statistics, Jump Pro 17

# Ellen Wang

Lexington, Massachusetts | 781-354-9613 | [ellenw1@stanford.edu](mailto:ellenw1@stanford.edu)

## EDUCATION

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### STANFORD UNIVERSITY

GPA: 3.95/4.00

STANFORD, CA

Sep 2023 – Jun 2027

#### B.A. in Economics, Minor in Data Science

- **Athletic Involvement:** Stanford Division I Fencing Team
- **Campus Involvement:** Stanford Finance, Stanford Women in Business (Director), Scholars of Finance (VP), Blyth Fund (Analyst)

### LEXINGTON HIGH SCHOOL

GPA: 4.15/4.00

LEXINGTON, MA

Sep 2019 – Jun 2023

## PROFESSIONAL EXPERIENCE

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### INCOMING 2025 AUDAX GROUP

Portfolio Operations Analyst

BOSTON, MA

Dec 2024 - Present

### KKR & CO. (SYLVAN INC. PORTFOLIO COMPANY)

Private Equity Summer Analyst

BEIJING, CHINA

Jun 2024 – Sep 2024

- Staffed on multiple deals in collaboration with KKR, each valued at USD \$300M+ EV.
- Reviewed and revised multiple 70+ page confidential information memorandums (CIMs) in collaboration with leading investment banks and consulting firms.
- Constructed and presented investment memos to KKR senior executives including full-LBO model with multi-scenario forecasting, precedent transactions, comparable company comp sets, and insights from industry expert calls.

### EVERGREEN SERVICES GROUP (ALPINE INVESTORS SPIN-OFF)

Sourcing Analyst

SAN FRANCISCO, CA

Jan 2024 – May 2024

- Collaborated with Evergreen's operating executives to establish the company's fifth vertical.
- Built and list-scrubbed 1,200+ potential targets, ensuring alignment with Evergreen's hold-only strategy and investment criteria.

### AMINO CAPITAL VENTURE FIRM (TOP 10 FORBES MIDAS SEED LIST 2023, 2024)

Analyst

PALO ALTO, CA

Jan 2024 – May 2024

- Constructed and presented pitch decks for managing partners, documenting business model, competitive landscape, and growth prospects for portfolio companies and potential investments.
- Participated in seed pitch meetings and gained direct exposure to entrepreneurs' investment narratives.

## LEADERSHIP & ACTIVITIES

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### STANFORD DIVISION I FENCING TEAM

Varsity Women's Foil

PALO ALTO, CA

Sep 2023 – Present

- Starter on Division I Fencing team, weekly commitment of 20+ hours including training, conditioning, and film analysis.
- 1 of 2 NCAA collegiate fencers selected to the US Olympic and Paralympic & NCAA fencing board to support policy initiatives.
- Spearheaded the first women's collegiate fencing championship and college recruiting seminars, impacting 500+ current NCAA collegiate fencers and generations forward.

### STANFORD WOMEN IN BUSINESS

Director, Board Member

PALO ALTO, CA

Sep 2023 – Present

- Directed and organized Stanford's Annual Young Women's Leadership Summit for 250+ attendees.
- Led and developed a robust pre-professional program teaching financial accounting, negotiation strategies, and career development.
- Organized and moderated panels in collaboration with McKinsey, BCG, and Stanford Graduate School of Business.

### WARBURG PINCUS INVESTMENT BANKING CASE COMPETITION

Team Lead

REMOTE

Dec 2024 – Present

- Selected to lead a small deal team tasked with recommending a new HVAC company to Warburg Pincus, responsible for managing 5+ process workstreams, ultimately approving our team's 3-statement model + presenting our final recommendation to senior leaders

## ADDITIONAL INFORMATION

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- **Programs:** Girls Who Invest, Make a Play Foundation Fellow, Recalc Academy, D.E. Shaw Discovery, Goldman Sachs Virtual Insight Series, J.P. Morgan Career.edYOU Academy, J.P. Morgan Asset & Wealth Management Insights Program
- **Skills:** Python (NumPy, Pandas, Scikit-learn), Microsoft Suite, Mandarin

# Evan Spagnoletti

+1 (631) 836-7381 | evanspag@sas.upenn.edu | Huntington, NY | [LinkedIn Profile](#)

## EDUCATION

**University of Pennsylvania** | Cumulative GPA: 3.83 /4.00

*Candidate for B.A. in Philosophy, Politics, & Economics*

*Minor in Geology*

**Philadelphia, PA**

*Expected May 2027*

- **Degree Program:** UScholars | **Research Concentrations:** Financial Markets, Macro-theory, AI & Statistical Finance
  - College program (1.25% selection rate) that integrates 4 years of concentrated research into undergraduate degree
  - Research Accolades: Vagelos Energy Research Nominee, Columbia University Distinction, CSHL STAR Award
  - View my UScholars Research Profile: <https://curf.upenn.edu/node/11560>

## WORK EXPERIENCES

**Catalyst Capital Advisors | Rational Funds**

*Incoming Portfolio Management Analyst*

**New York City, NY**

*Summer 2025*

**Catalyst Capital Advisors**

*Institutional Sales Analyst*

**New York City, NY**

*Summer 2024*

- Utilized CRM tools (Salesforce) and Broadridge's Opportunity Hunter to analyze client interactions and business data
- Facilitated appointments and introduced Milburn Hedge Strategy (MBXIX) to 200+ clients daily via phone and email
- Created 10+ quarterly performance slide decks on strategies across fixed income, commodities, and equities
- Developed an investment proposal report on a \$1M+ trading position in fixed income bonds under the CASIX fund

**The Wharton School | Dr. Catherine Schrand & Dr. Walter Palmer**

*Investment Researcher*

**Philadelphia, PA**

*September 2023 – Current*

- **Study Title (Incoming):** “Exploring AI Solutions for Urban Financing & Grid Planning”
- **Study Title:** “Event Study of Cobalt Mine Acquisitions on Cobalt Futures & EV Battery Stock Prices”
  - Created a literature review with 35+ sources to identify major mining companies' cobalt acquisitions since 2010
  - Leveraged Wharton Research Data Services to analyze 50+ mine acquisitions each within a 250-trading day spread
  - Computed Cumulative Abnormal Returns (CAR) within a 5-day event window by conducting regression analysis
  - Selected to present research findings at the Vagelos 4th Annual Frontiers of Energy Research Convention
- **Study Title:** “Forecast for Eli Lilly (NYSE: LLY) Post-Q3 2023 Earnings: Literature Study”
  - Conducted a competitive analysis of the pharmaceutical industry analyzing over 5 drug competitors for Eli Lilly
  - Identified the release of Pirtobrutinib and the FDA's approval of Zepbound as catalysts for long term growth

## INTERCOLLEGIATE SPORTS

**University of Pennsylvania's Men's Varsity Swimming & Diving Team**

*NCAA Division 1 Student-Athlete*

**Philadelphia, PA**

*August 2023 – Current*

- Training 25+ hours per week, including morning and evening practices, weightlifting, and drylands
- Member of Penn Athletics Wharton Leadership Academy, partaking in problem-solving training with athletes weekly
- **Awards:** NY YMCA State Champion (100 yd. Butterfly & 50 yd. Freestyle), 5x All-State (Top 10), 12x All-County

## LEADERSHIP & PROFESSIONAL DEVELOPMENT

**Make A Play Foundation (MAP) | Warburg Pincus**

*Diamond League Fellow & Case Competition Captain*

**Philadelphia, PA**

*September 2024 - Current*

- Selected as 1 of 9 student-athletes to lead a team of 5 for a case competition analyzing HVAC companies for Warburg
- Evaluated financial metrics, culminating in a 10-slide client presentation recommending strategic company acquisitions

**Wharton Financial Literacy Community Project (WFLCP)**

*Financial Literacy Mentor*

**Philadelphia, PA**

*Fall 2024*

- Mentored West Philadelphia high school students weekly, teaching them about wealth growth via index fund investing
- Assisted in leading an online outreach team that secured a \$3M partnership with the Shawn Carter Foundation

**Wharton Hedge Fund Club (WHFC)**

*Long/Short Equities Trader*

**Philadelphia, PA**

*January 2024 – Current*

- Delivered investment strategy presentations, valuations, and learned the utilization of basic derivatives in trading
- Analyzed market trends in the technology and consumer sectors, pitching long positions on NASDAQ: PLTR & BYND

**Other:** D. E. Shaw & Co. 2025 Latitude Fellow, Wharton Energy Group, Wharton Latino, Beta Theta Pi, SEO Career

## ADDITIONAL INFORMATION

**Teaching Experience:** TA for Neighborhood Displacement and Community Power (Africana Studies 4480)

**Skills:** Communication, Market Analysis, Microsoft Office (Word, Excel, PowerPoint), Research, Outreach Sales, WRDS

**Interests:** Barbequing, Basketball, Commodities, Energy, House Painting, Lapidary, LEGO Technics, Poker

# Flora Caiyi Zhang

941-241-6678 | [fz6819@princeton.edu](mailto:fz6819@princeton.edu) | [linkedin.com/in/caiyi-zhang121](https://www.linkedin.com/in/caiyi-zhang121)

## EDUCATION

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**Princeton University**, Princeton, NJ August 2023 - May 2027

A.B., Economics | Intended Minor: Finance | GPA: 3.776 / 4.000

*Coursework*: Microeconomic, Macroeconomics, Econometrics, Financial Accounting, Asian Capital Markets, Entrepreneurial Finance and Private Equity, Corporate Finance and Financial Institutions | *Award*: 2024 WGCA Scholar All-American

**IMG Academy**, Bradenton, FL August 2019 - June 2023

*Honors and Activities*: Salutatorian, Yale Book Award Recipient, National Honor Society, International Club | GPA: 4.82 / 4.33

## PROFESSIONAL EXPERIENCE

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**Girls Who Invest**, Remote January 2025

*Incoming OIP Scholar*

- Selected for a rigorous self-directed program on accounting, financial modeling, and investment principles, utilizing CFA Institute and Wall Street Prep resources; plan to collaborate with other scholars through assigned study pods

**Make A Play Foundation**, Remote August 2024 - Present

*Diamond League Fellow; Women PITCH Too Fellow*

- Leading the Project Execution phase in the Warburg Pincus Case Competition, gaining foundational skills in DCF analysis
- Collaborated with 4 female student-athletes in weekly sessions, culminating in the Bank of America stock pitch competition

**Bazaar Ventures**, Remote September 2024 – December 2024

*Search Fund Business Analyst*

- Conducted research on niche segments within the Healthcare industry using both broker and proprietary approaches
- Identified over 100 target companies, and initiated outreach to business owners through cold emails and phone calls
- Contributed to weekly strategic meetings by proposing acquisition targets and assisting with lead generation efforts

**Fortune Capital**, Beijing, China May 2024 - August 2024

*Venture Capital Summer Investment Analyst - AI Team*

- Prepared 20+ question lists for management, clients, and supplier interviews; assisted with 4 due diligence processes
- Delivered in-depth presentations on AI long-form text generation and AI companions to the entire company across offices
- Participated in weekly strategy meetings with senior partners, providing updates on logistics and insights from on-site visits
- Collaborated with analysts and interns to create research reports on generative AI market trends and industry insights

**JP Morgan Investment Banking Virtual Experience Program via Forage**, Remote July 2024

*Participant*

- Developed M&A screening and analysis skills by integrating DCF valuation techniques with insights from current events

## LEADERSHIP AND EXTRACURRICULAR EXPERIENCE

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**Princeton University Varsity Women's Golf Team**, Princeton, NJ August 2023 - Present

*Team Member*

- Commit 20+ hours weekly to practice and competition year-round; posted Top-15 finishes at UNC and Princeton Invitational
- Team Champion at 2025 Nittany Lion Invitational and Princeton Invitational

**Asian Student-Athletes of Princeton**, Princeton, NJ October 2023 - Present

*Alumni Outreach Officer*

- Host speaker events and study breaks during the semester to strengthen connections among 128 current and alumni members

**IMG Golf Elite Leadership Team**, Bradenton, FL August 2021 - May 2023

*Captain; Director of Mental Health and Wellness*

- Collaborated with mental coaches to lead biweekly sessions focused on implementing performance-enhancing strategies
- Led mental-toughness discussions following Cross-Sports Training Sessions for Track, Lacrosse, Tennis

**Activities**: Business Today, Princeton Corporate Finance Club, First-Year Orientation Leader, McGraw Learning Cohort (Winter'25)

## SKILLS & INTERESTS

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**Skills & Applications**: Microsoft Excel, PowerPoint, Canva, Bloomberg Market Concepts | **Language**: English, Mandarin

**Interests**: Outdoor Activities, Running, Cooking, Coffee

# GABRIELLE L. NELSON

[HTTPS://WWW.LINKEDIN.COM/IN/GABRIELLE-NELSON-AB3954241/](https://www.linkedin.com/in/gabrielle-nelson-ab3954241/) • (513) 908-9050 • [GABRIELLE.NELSON@BISON.HOWARD.EDU](mailto:GABRIELLE.NELSON@BISON.HOWARD.EDU)

## EDUCATION

**Howard University** – Washington, D.C. **GPA: 3.91 /4.0**  
B.E. in Chemical Engineering | ACT/SAT: 31 Anticipated Graduation: 2027

- **Accomplishments:** Emerging Leaders Standout Camp at Procter and Gamble 2024 Participant, FOSSI Scholar, Division I Student-Athlete, Dean's List
- **Relevant Courses:** AP Psychology, Calculus I,II, & III, Intro. to Contemporary Africa, Introduction to Chemical Engineering Design I & II

## PROFESSIONAL EXPERIENCE

**Procter and Gamble - Beauty Engineering Intern** | Martinsburg, West Virginia **Expected Start Date: 05/2025**

- Developed and optimized production processes, reducing waste and improving product quality through data analysis and engineering solutions
- Participated in presentations, contributing insights for process improvements and new product development

**LIFT Lacrosse – Coach** | Cincinnati, Ohio **05/2024 – 08/2024**

- Developed and implemented skill-based training programs to optimize player development and drive team success, emphasizing both technical skills and tactical understanding of the game
- Provided education, mentorship, and support to young women, fostering personal growth and athletic excellence both on and off the lacrosse field

**Cancer Kids First DC Chapter – Secretary** | Washington, D.C. **06/2024 – Present**

- Active member of the DC chapter of the world's largest youth-led pediatric cancer nonprofit, dedicated to improving the lives of young patients and their families
- Coordinated with small businesses and alumni to secure resources, sponsorships, and partnerships for impactful events

**Jeni's Splendid Ice Cream – Marketing Ambassador** | Cincinnati, Ohio **05/2023 – 08/2023**

- Maintained a thorough knowledge of all menu items and answered questions regarding ice cream flavors and their preparation to provide excellent customer service to consumers
- Ensured accuracy of all financial transactions and returned appropriate change

**University of Cincinnati Chemistry Laboratory – Student Researcher** | Cincinnati, Ohio **05/2022 – 08/2022**

- Contributed to a project in Dr. Anna Gudmundsdottir lab under supervision of graduate student with a completed manuscript in progress
- Completed poster presentation at the American Chemistry Society Conference in Indianapolis

## LEADERSHIP & COMMUNITY DEVELOPMENT

**Make A Play Foundation (MAP) – Diamond League Fellow** | Remote – New York, NY **11/2024 – Present**

- Selected to participate in a two-part fellowship for high-achieving college athletes looking to prepare for success at leading companies
- Participating in a case study with top private equity firm, Warburg Pincus, introducing a new HVAC company with a 3-statement model

**Grassroots Health – Lead Volunteer** | Washington, D.C. **01/2024 – Present**

- Assisted in community outreach initiative aimed at promoting public health awareness and wellness programs in underrepresented middle schools
- Mobilized NCAA Division I athletes as health educators and role models, fostering engagement and positive influence for youth

**College of Engineering & Architecture Student Council – Programs Coordinator** | Washington, D.C. **05/2024 – Present**

- Planned and executed social, community service, professional development, and mentorship events for students within the College of Engineering & Architecture (CEA)
- Organized community outreach initiatives and service events, promoting civic engagement and strengthening relationships between the college and local communities

**P.R.E.T.T.Y Period – Event Coordinator** | Washington, D.C. **06/2024 – Present**

- Successfully coordinated events, ensuring seamless execution and alignment with its mission to promote a safe environment for women on campus and facilitate meaningful discussions on issues affecting women
- Developed and submitted comprehensive typed proposals detailing the purpose, objectives, venue, and logistics of each event, enabling efficient planning and clear communication among stakeholders.

**Bread For The City – Volunteer** | Washington, D.C. **09/2024 – Present**

- Assisted underrepresented and vulnerable populations in selecting groceries at a community food pantry, ensuring access to healthy, nutritious food
- Provided personalized support to clients, offering guidance on available options while respecting individual needs and dietary preferences

**Howard University Undergraduate Student Assembly - Programming Staff** | Washington, D.C. **06/2024 – Present**

- Provided administrative support to directors, contributing knowledge to assist with various operational tasks
- Served as a liaison between directors and student organizations, facilitating clear communication and ensuring timely responses to student inquiries

## SKILLS & INTERESTS

- **Skills:** Teamwork, Forecasting & Demand Planning, Matlab, Leadership, Technical Proficiency
- **Interests:** Sports, Traveling, Mentorship, Community Outreach

# HOLLIE M. PARDINI

## EDUCATION

www.linkedin.com/in/holliemp • (707)812-8714 • [HOLLIEPARDINI@GMAIL.COM](mailto:HOLLIEPARDINI@GMAIL.COM)

Georgetown University – Washington, D.C.

GPA: 3.4/4.0

B.A. in Business Administration | Majors: Operations & Analytics, Finance | The McDonough School of Business

- **Technical Skills:** Experienced in MS Excel, Proficient in MS Word and MS PowerPoint
- **Data Analytics:** Data Visualization and Model Building

Graduation Year: 2027

## PROFESSIONAL EXPERIENCE

Catching Coach | *Private Instructor, Self Run* | Petaluma, CA

June 2020 – Present

- Built and managed a private coaching business, overseeing scheduling, marketing, and financial operations
- Developed individualized performance plans to enhance athlete skills and game strategy
- Established long-term mentorship relationships, emphasizing confidence building and leadership development

All American Sports Academy 14u Hall | *Assistant Coach* | Petaluma, CA

May – Aug 2024

- Teach young girls the fundamentals and skill work for their softball position
- Designed and implemented data-informed drills and training to improve player performance
- Leading them to have a presence on the field and a game IQ to perform at a higher level
- Provided mentorship, fostering resilience, teamwork, and strategic thinking

## LEADERSHIP & COMMUNITY DEVELOPMENT

Warburg Pincus Investment Banking Case Competition – *MAP Participant* | New York, NY (Remote)

12/2024 – Present

Selected Case Experience:

- *Executing a comprehensive valuation analysis of a new HVAC company aligning with Warburg Pincus' 2025 investment strategy (ongoing)*
- Collaborating with a small deal team of peers to advise Warburg Pincus on the potential acquisition of a new HVAC company, specifically tasked with completing ~20% of the project by creating 5+ financial assumptions and building our balance sheet
- Analyzing historical performances, operational strategy, market conditions, industry projections, and other key metrics to create an assumptions tab in Excel with 5-8 financial forecasts on how our business will perform, providing my team with reliable data
- Preparing my team's balance sheet in under 1 week, applying the lessons learned from ~5 hours of instruction on Wall Street Prep (Chapter 3: Balance Sheet) to provide a snapshot of our company's assets, liabilities, and shareholders' equity for up to 5 years

Make A Play Foundation (MAP) – *Diamond League Fellow (Fall '24)* | Remote | Rating: Very Strong

09/2024– 11/2024

- Participated in a 2-part fellowship for second-year college athletes from under-resourced backgrounds looking to prepare for success in the financial services industry, completing 3 modules on interview preparation and business communications
- Competed in 3 group mock interviews against 50+ other college athletes, receiving a 'very strong' rating in at least 2 of the interviews, advancing to Phase 2 of the fellowship ("the team competition") with Warburg's Human Capital Team

Softball Camps | *Coach* | Petaluma, CA

Aug 2020 – Present

- Lead and run softball camps for younger club members from ages 9-13. There I specifically help aspiring catchers, but I also teach the fundamentals for other positions.
- Challenged with keeping the attention of young girls for a longer period, and I get a chance to give to the community that I started from and where my love of the game began

Georgetown University Student Athlete Advisory Committee | *Mentor* | Washington, DC

Aug 2024 – Present

- Vice President of Community
- Spearheaded initiatives to enhance student athlete engagement and community impact
- Advocated for athlete well-being, DEI, and professional development training
- Lead and organized events like Cycle for Survival and Capitol Hill Day

Georgetown Athletics | *Student-Athlete* | Washington, DC

Aug 2023 – Present

- Compete in NCAA Division 1 Softball in the Big East Conference, dedicating 30+ hours per week to training and games
- DEI and Community representative for softball team
- Starting catcher as a freshman demonstrating leadership and teamwork

Women in Real Estate (WIRE) | *Affiliate* | Washington, DC

Sep 2024-Present

- Attend site visits and learn from experts in their field
- Attend monthly meetings and gain an understanding of values and finances specific to real estate

McDonough Women | *Affiliate* | Washington, DC

Dec 2024-Present

- Engage and participate in networking events with other entrepreneurial women, learn about various career opportunities in finance
- Contribute to dialogue about empowering women in academic settings and promoting the MSB as an environment to excel as a woman
- Strive to increase the future presence of McDonough alumnae on corporate boards

## NON-TECHNICAL SKILLS & INTERESTS

- **Volunteering:** Homeless Outreach Program & Education (HOPE); Nationals Youth Academy After-School Program
- **Awards:** NCS Scholar Athlete, 2019-2023, First Team All-State Softball 2022, 2023 Petaluma High School Offensive MVP 2022, Austin Mahoney Award 2020, Honor Roll Petaluma High School 2020

# Isabella Chin

36 Colony Ln, Manhasset, NY 11030 | [isabella\\_chin@college.harvard.edu](mailto:isabella_chin@college.harvard.edu) | (917) 892-0632

## EDUCATION

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### Harvard College

Cambridge, MA  
May 2027

- A.B Candidate: Economics, Secondary: Computer Science
- GPA: 3.7/4.0
- Relevant Coursework: Introduction to Computer Science, Multivariable Calculus, Introduction to Microeconomics, Introduction to Macroeconomics, Intermediate Microeconomics, Intro Quant Methods for Econ (Statistics)
- Harvard Varsity Fencing Team (Epee), Division I NCAA
  - 2025 Ivy League Women's Team Champions
  - 2025 All-Ivy League Honors Second Team
  - 2024 NCAA Team National Champions
  - 2024 NCAA Fencing Second Team All-American
  - Commit 25+ hours per week (competitions, practice, and lift)

### Manhasset Secondary School

Manhasset, NY  
June 2023

- 4.47/4.0 Weighted GPA
- High Honor Roll, AP Scholar with Honor, The School Community Association Head of the Class Award (Top 20/292 students)

## LEADERSHIP AND ACTIVITIES

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### Harvard Financial Analysts Club (HFAC)

Cambridge, MA

*Club Member*

September 2024 – Present

- Develop the ability to evaluate business quality by analyzing financial performance, competitive positioning, and growth potential, read financial statements, learn basic accounting principles, quantify the value of businesses through financial modeling, compare the performance (and price) of companies
- Analyze prominent companies through group discussions to evaluate their strengths, weaknesses, and market strategies, gaining insights into what sets them apart from competitors and drives their success
- Pitched a stock at the end of the fall semester

### London School of Economics and Political Science

London, England

*Student*

July 2024

- Selected to participate in a prestigious summer study abroad program, engaging with a diverse cohort of top students from around the globe
- Collaborated and expanded on global perspectives with students and engaged in cross-cultural academic and personal growth
- Completed Intermediate Macroeconomics — mastered topics about budget constraints, monetary and fiscal policy, credit-market imperfections, business cycles, inflation, banking, unemployment

### Women in Computer Science (WiCS)

Cambridge, MA

*Club Member*

September 2023 – December 2023

- Actively participated by attending meetings and social events designed to cultivate a strong sense of community
- Built meaningful connections and fostered a supportive network with inspiring women passionate about computer science
- Engaged in insightful discussion tackling the unique challenges faced by women in tech, exchanging ideas and strategies to promote inclusivity and empowerment

### USA Fencing

Manhasset, NY

*Varsity Player*

September 2013 – Present

- Compete internationally at World Cups for the US and domestically in the Junior and Cadet age categories, with multiple championship titles. Some examples of achievement in fencing:
  - Gold and Bronze in Cadet Teams at World Cups
  - Gold in Junior Teams at National Championship and Junior Olympics
  - Gold in Junior National Championship
  - Gold in Junior World Cup
- Played a crucial part in leading the Harvard Varsity Fencing Team to a historic NCAA championship 2024 and an Ivy League Women's Team championship 2025
- 5th in the world in the Junior age category 2023 and 10th in the US in the Senior age category 2023

### Make A Play Foundation

Cambridge, MA

*Remote Intern*

January 2025 – Present

- Selected out of a competitive pool of candidates to participate in intensive interview preparation with real questions from Fortune 500 employers
- Receive personalized feedback on mock interviews from MAP Alums who've secured roles at leading companies
- Complete 3 individual assignments per week, do 1 mock interview per week, and join a networking event with MAP's partner companies

## WORK EXPERIENCE

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### SDIC Securities

Guangzhou, China

*Incoming Investment Banking Summer Analyst*

Start Date: June 2025

- Will assist securities investment consultants in providing customers with securities investment analysis and consultation
- Will support the operations department in delivering exceptional customer securities business services
- Will contribute to the company's efforts in offering service support for listed companies, private equity funds, and other clients

### New York Fencing Academy

Manhasset, NY

*Camp Counselor and Referee*

September 2020 – Present

- Lead and coach intermediate athletes at international summer camps
- Guide younger athletes regarding the college recruiting process and worldwide competitions
- Referee multiple sanctioned fencing competitions at the fencing academy

## ADDITIONAL INFORMATION

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- **Skills:** R (statistical programming software), Microsoft Word, Microsoft Powerpoint
- **Interests:** Crocheting, pickleball, baking, traveling, dystopian action movies
- **Languages:** English, Limited Conversational fluency in Spanish and Cantonese

# ISAIAH I GONZALEZ

[HTTPS://WWW.LINKEDIN.COM/IN/ISAIAH-GONZALEZ-9598082AA/](https://www.linkedin.com/in/isaiah-gonzalez-9598082aa/) • (630) 270-9350 • [ISAIAHGONZALEZ7@UCHICAGO.EDU](mailto:ISAIAHGONZALEZ7@UCHICAGO.EDU)

## EDUCATION

**University of Chicago** – Chicago, Illinois

**GPA: 3.73/4.0**

B.A. in Economics, Specialization in Business Economics

Anticipated Graduation: June 2027

- **Accomplishments:** Odyssey “Full Tuition” Scholarship, First Phoenix Scholarship, Dean’s Scholarship Award Recipient, 2023-2024 Midwest Conference All-Academic Team, Varsity Football Offensive Rookie of the Year
- **Relevant Courses:** Financial Accounting, Statistical Methods and Applications, Elemental Functions and Calculus I & II
- **Wall Street Prep Education by 2025:** Accounting Crash Course, Investment Banking Interview Guide, IB Soft Skills

## PROFESSIONAL EXPERIENCE

**Kayne Anderson** – *Incoming Summer Research Analyst* | Houston, TX

**Incoming June 2025**

- Incoming Summer Research Analyst at Kayne Anderson’s Energy Infrastructure Fund with \$6.1 billion assets under management

**Dream Academy Foundation** – *Business Admin Intern* | *Life Development Program Lead* | Chicago, IL

**06/2024 – Present**

- Identified and drafted letters of inquiry for outreach to 40 potential grants, donors, sponsors, and vendors
- Conducted research on five similar nonprofits to identify key factors and strategies behind their success
- Facilitated a new connection with a partner to expand and improve the company’s charitable events

**OSP Investments, OSP Paint & Remodeling** – *Laborer* | Chicago, IL

**Summer 2022 and 2023**

- Identified 30 potential investment-grade properties and communicated with 15 owners regarding their homes
- Established a bond with 13 tenants of already-owned properties in both English and Spanish
- Remodeled 27 properties by demoing, framing, flooring, drywalling and mudding, painting, and staining

**N&J Landscaping** – *Co-Founder & Owner* | Chicago, IL

**04/2020 – Present**

- Increased revenue stream and customer base by fostering the landscaping skills of five employees
- Cultivated and sustained many customers, maxing at 15, from inception through present time

## LEADERSHIP & COMMUNITY DEVELOPMENT

**Warburg Pincus IB Case Competition** – *Selected Participant* | New York, NY (Remote)

**12/2024 – Present**

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg’s investment strategy (ongoing)**
  - Selected to lead a small deal team tasked with recommending a new HVAC company to Warburg Pincus, responsible for managing 5+ process workstreams, ultimately approving our team’s 3-statement model + presenting our final recommendation to senior leaders
  - Organizing ~2 team discussions per week to ensure 100% compliance with deadlines, developing a 2-page written project plan with SMART goals + a schedule of tasks/milestones for all 5 workstreams, ultimately ensuring we deliver a compelling final presentation
  - Performing a strategic review of 5+ work streams (planning, execution, control, monitoring, closure), discovering essential insights on success probabilities in the HVAC industry and swiftly locating and removing any errors comfortably ahead of the deadline(s)
  - Applying the lessons learned from 20+ hours of accounting instruction on Wall Street Prep to oversee the construction of our income statement, balance sheet, and cash flow statement, sense checking each statement to ensure accuracy

**Make A Play Foundation (MAP)** – *Diamond League Fellow (Fall ‘24)* | Remote | Rating: Very Strong

**09/2024 – 11/2024**

- Participated in a 2-part fellowship for second-year college athletes from under-resourced backgrounds looking to prepare for success in the financial services industry, completing 3 modules on interview preparation and business communications
- Competed in 3 group mock interviews against 50+ other college athletes, receiving a ‘very strong’ rating in at least 2 of the interviews, advancing to Phase 2 of the fellowship (“the team competition”) with Warburg’s Human Capital Team

**University of Chicago Football and Wrestling** | *Starting Left Tackle* | *285 lb Wrestler* | Chicago, IL

**08/2023 – Present**

- Balanced full academic coursework with 25+ hours per week of practice, film studies, traveling, and competition
- Arrived on campus seven weeks early for preseason, including 12 hours per day of training, meetings, and practices
- Wrestled in the 285 lb weight class for the NCAA Division III Team during the winter and spring quarters

**Scholars of Finance** – *Member* | Chicago, IL

**10/2024 – Present**

- Participated in weekly leadership development discussions, career preparatory workshops, executive speaking engagements, a mentorship network, and an annual Chicago Symposium hosting 50+ executives and 200+ students
- Completed an eight-week leadership development program centered around financial integrity and capital stewardship

**Maroons of Character** – *Member* | Chicago, IL

**08/2023 – Present**

- Attended seminars, facilitated discussions, and learned how to incorporate important virtues into personal and professional realms

**Immaculate Conception Catholic Prep Football and Wrestling** – *2-Sport Captain* | Chicago, IL

**08/2018 – 05/2023**

- **Football Honors:** 2022-23 State Champion, All-State Selection, 2x Offensive Lineman of the Year for the Metro Suburban Conference, 3x All-Conference Selection, 37-6 High School Football Record, 0 Allowed Sacks, Career Pancake Blocks Leader
- **Wrestling Honors:** 2023 State Champion, 3x State Finalist and 4x State Qualifier, 97-12 High School Record

## NON-TECHNICAL SKILLS & INTERESTS

- **Skills/Language(s):** Accounting | Presentation Skills | Conversational Spanish | Strong Quantitative Skills | MS Excel & Word | Sales/Marketing Techniques | Agile Project Management | Scrum Methodology | Tuckman’s 5 Stages of Group Development
- **Interests:** Fishing | Football | Wrestling | The Phi Gamma Delta Fraternity | Video Games | Coaching Wrestling and Football

# JADYN HSIEH-BAILEY

(708)-834-0026 | jadyhhsiehbailey@uchicago.edu | www.linkedin.com/in/jadyn-hsieh-bailey-791b42341

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## EDUCATION

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### The University of Chicago

Bachelor of Arts in Political Science & Philosophy

Chicago, IL

Expected, June 2027

- Cumulative GPA: 3.58/4.0
- Relevant Coursework: Financial Accounting

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## PROFESSIONAL EXPERIENCE

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**Prep Baseball Report**— Largest scouting service of amateur baseball, providing national year-round coverage  
Staff Writer

McCook, IL

May 2024 – September 2024

- Wrote and covered stories both on-site and remote for the Illinois, Wisconsin, and National branch
- Contributed to 16 stories/articles; earned 7 article bylines attributed to my name, working both independently and in teams

**“JMHB” Soccer Training**— Hired by parents in local area to provide personalized soccer training sessions  
Private Trainer

Oak Park, IL

April 2022 – August 2023

- Created and ran my own private training sessions, catered training plans for athletes aged 11-14 to help them make their high school/club teams
- Earned \$800+ training and developing players to go into their tryouts/seasons confident and ready

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## LEADERSHIP & EXTRACURRICULAR ACTIVITIES

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**Make A Play Foundation**— Exclusive fellowship for high-achieving student-athletes  
Winter Fellow (Phase 1)

Remote

January 2025 – Present

- Selected from competitive pool of candidates, competing against peers in weekly mock interviews to implement learning modules of behavioral, technical, and hybrid interview preparation
- Attend weekly virtual recruiting events, learning how to transform my experience as a student-athlete into a successful career at a leading company

**University of Chicago Men’s Soccer**— NCAA Division III Men’s Soccer, Men’s Varsity team  
Student-Athlete

Chicago, IL

August 2023– Present

- 30+ hours a week during pre-season; 16+ hours a week in-season, balancing a collegiate athletic schedule and rigorous course schedule
- UAA (University Athletic Association) All-Academic Honors; a testament to my success and focus managing this schedule

**The Chicago Skeptics Society**— Organization catered to facilitate and improve in philosophical debate and discussion  
Member

Chicago, IL

September 2023 – Present

- Bi-weekly meetings/discussions, broadening philosophical expertise and honing my articulation and debate skills

**OPRFHS Leadership/Launch Program**— Peer mentoring program to provide social and academic support for freshmen  
Senior Mentor/Leader

Oak Park, IL

August 2022 – June 2023

- Recommended then selected to be senior mentor for freshmen throughout the school year
- Learned/practiced leadership skills two days a week; worked closely with two freshmen three days of the week to provide social, academic, and emotional support/guidance; witness their development throughout the year

**Score for a Cause**— Promotion of the July 4<sup>th</sup> Recovery Fund following the Highland Park parade shooting  
Co-Founder

Oak Park/Highland Park, IL

October 2022 – July 2023

- Worked in collaboration with the Highland Park Community Foundation to support community and victims and advocate for stricter gun laws and control
- Solicited funds distributed to various Highland Park organizations through organized event at Senior Night soccer game against Highland Park
- Raised over \$2,000 in first three weeks of opening; the July 4<sup>th</sup> Recovery Fund closed in July with almost \$3,000 raised from ‘Score for a Cause’

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## SKILLS & INTERESTS

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- Skills and Language(s): Leadership, communication, teamwork, debate, qualitative/quantitative research; elementary level proficiency in Japanese, currently learning and taking courses
- Interests: Researching, analyzing, and discussing trends in global financial markets; journalism; philosophy (reading, writing, discussion); political and philosophical debate; soccer, baseball

# JANICE SHEN

[js3678@cornell.edu](mailto:js3678@cornell.edu) | (607) 379-1193

## EDUCATION

**Cornell University** – Ithaca, New York

*B.A. Double Major in Economics and Information Science with a Minor in AI*

Expected Graduation: May 2027

**GPA: 4.0**

- NCAA Division I Student-Athlete (Women's Equestrian)
- Select Coursework: Financial Accounting, Intermediate Macroeconomics & Microeconomics, Probability Models, Intro to Computing: Design and Development, Object-Oriented Programming and Data Structures, Data Science

## INTERNSHIP

**HK Securities and Futures Commission – Financial Regulatory Authority**

**Hong Kong, SAR**

*Summer Intern in CEO Office, Mainland, International, and Sustainable Finance Team* (<https://www.sfc.hk/>)

June 2024 – August 2024

- Delivered a series of Excel analyses on corporate sustainability regulations, comparing and summarizing findings on compliance, materiality, and scenario analysis for different Stock Exchanges
- Conducted two research projects on sustainable information disclosure, cross-examining international standards (IFRS) with regional government statements to evaluate how countries adopt or integrate international standards based on strategic, local assessments
- Managed an internal market newsletter, curating groundbreaking news impacting the Hong Kong and Chinese markets, and presented updates to the Executive Committee and Directors every Tuesday and Friday
- Completed employee training courses, including Introduction to the Futures Market, Global Trends, Sustainable Investment, and AML

**LT Heyday Culture Communication Co. – Public Relations Consultancy**

**Hong Kong, SAR**

*Marketing Assistant Summer Intern* (<https://www.ltheyday.com/>)

July 2022

- Conducted market research, developed tailored strategies for clients to increase customer base, profits, or improve public image
- Supervised Green Hospitality's hackathon and coordinated between in-person guests, panelists, 400+ online participants
- Facilitated InnoX's (a non-profit educational institute) opening event, jointly established by government, industry, and academia; liaised between teams of technological entrepreneurs, scholars, CEOs, government, performers, professors, journalists, and 600+ attendees
- Managed 7 clients, including HKIOC (Hospital), HongShan (Chinese VC), St. Johns (fashion), Micro Connect (Fintech Startup)

## LEADERSHIP & COMMUNITY DEVELOPMENT

**Diversity On The Streets – Cornell University Finance Club**

**Ithaca, NY**

*VP of Marketing & Analyst in the Technology Team* (<https://www.diversityonthestreet.com/>)

February 2024 – Present

- Presented to Carlyle Group in a final round stock pitch competition on software company ServiceNow, collaborated with a team of 4
- Completed training in financial skill sets such as financial statements, comps, and DCFs; manage social media and team bonding

**Make A Play Foundation (MAP) – Selective Pre Professional Preparation Program for Athletes**

**New York, NY**

*Skills Challenge Fellow & Women's Initiative Network Fellow '24* (<https://makeaplayfoundation.com/>)

March 2024 – Present

Select Case Experience:

*Warburg Pincus - Student Analyst*

January 2025 – Present

- Executing a comprehensive valuation analysis of a HVAC company aligning with Warburg Pincus' 2025 investment strategy (ongoing)
- Analyzing historical performances, operational strategy, market conditions, industry projections, and other key metrics to create an financial model in Excel with pro forma forecasts on how the business will perform

*JMI Equity - Private Equity Student Consultant*

June – September 2024

- Developing an investment proposal on how to improve Onboard, a cloud-based board management solution, and recommending it to MAP
- Conducting needs analysis such as the hook model to customize our proposal, finalizing actions to increase the efficiency of Onboard

*Morgan Stanley – Fixed Income Student Analyst; Execution Phase Owner*

March – May 2024

- Collaborated with a team of 5 to deliver a recommendation to MS's Fixed Income team to MD Stephen Dance using a 60/40 split between equity and fixed income for a client's retirement portfolio with a total value of \$1M
- Developed an investment thesis and portfolio for a client that recommended the best portfolios of equities to invest in through the start of 2024 (3 securities), bridging the gap between the concept and actions required to complete the project for my team

**Life Changing Labs – Startup Accelerator**

**Ithaca, NY**

*Community Engagement officer* (<https://www.lifechanginglabs.com/>)

February 2024 – Present

- Develop the entrepreneurship community through facilitating weekly guest lecture series and assisting with venture investment activities
- Partner with team members to promote new programs, draft newsletters, and oversee social media accounts

**Independent Research Project**

**Hong Kong, SAR**

*Securing a Safe City: Labor Conditions of Residential Security Guards in Hong Kong* ([doi.org/10.47611/jsrhs.v11i2.2897](https://doi.org/10.47611/jsrhs.v11i2.2897)) October 2022 - May 2023

- Conducted field research and literature review on the managerial landscape in HK and labor conditions of residential security guards
- Performed needs analysis for the residential security guards and communicated findings and recommendations to managers; published in the Journal of Student Research

## SKILLS & INTERESTS

- **Languages:** Bilingual English and Chinese; Spanish (intermediate)
- **Technical Skills:** Microsoft Office, Excel, Python, Java, SQL | Certificate in Accounting and Financial Modeling (Wall Street Prep)
- **Music:** Performing Chinese zither and oboe; sang with Cornell University Chorus (sponsored for Northeast tour 2024)
- **Interests:** Reading novels; open-style dance; food in general; a good anti-hero; board games (Cluedo, Jenga); hiking

# JULIA NAKABUGO LEARY

[LinkedIn Profile](#) • (315) 663-7996 • [jl4245@cornell.edu](mailto:jl4245@cornell.edu)

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## EDUCATION

**Cornell University** – Anticipated 2027 | Ithaca, New York **GPA: 3.58/4.0**  
B.A. Economics & B.A. (Hons) Multidisciplinary Research (College Scholar) | Minor in Int'l Markets & Development

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## PROFESSIONAL EXPERIENCE

**Financial Development & Accounting Intern** – *Lybertine (startup, pre-seed)* | London, UK **Jul.-Aug. 2024**

- Conducted market research and created both financial documentation and forecasts for internal and external use, supporting company-wide development and completing deliverables for later investment stages
- Compiled documentation for use in streamline procedures across platforms on both front and backend by logging all necessary processes for documentation of revenue across multiple software programs, including Xero and general ledgers; led accounting team to begin integrating thorough and detailed reporting practices

**Corporate Strategy Intern** – *Brous Enterprises/Flair Strategic Communications* | Ithaca, NY **May-Jun. 2024**

- Researched and analysed Ithaca real estate market to deliver consultation for entrance of new firm, utilising past experience to provide insight, and conferred with companies across industries to build firm's network
- Created database to track and evaluate comparable firms for competitiveness and collaborative potential, including analyses regarding comparative size and customer base to improve firm's understanding of market

**Leasing Professional** – *Campus Life & Style* | Syracuse, New York **Apr.-Aug. 2023**

- Utilised effective sales techniques to fully lease 250+ bed properties within a two-month period, enacted managerial changes to improve efficiency and stay under budget, drafted & published press releases
- Managed accounts receivables, ran delinquency reports and resolved outstanding balances, coordinated 12 different vendors during turn, did emergency on-call & basic maintenance work due to staff shortages
- Spearheaded social media marketing, acting liaison of corporate and local teams, collected data for weekly market reports, trained new employees, translated notices, leasing and legal information into Spanish

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## LEADERSHIP & COMMUNITY INVOLVEMENT

**Winter Fellow** – *Make a Play Foundation (Formula 1 Undergraduate Program)* | Remote **Jan. 2025-present**

- Selected to participate in exclusive fellowship for high-achieving college athletes, competing against 50+ others in weekly mock interviews to implement learnings from modules and instruction on interview advice

**NCAA Varsity Athlete** – *Fundraising Coordinator, Leaders2Leaders Participant* | Ithaca, NY **Sept. 2023-present**

- Responsible for fundraising management, alumni and donor organisation; grossed over \$100,000 in 24 hours during Cornell's 2024 Giving Day; elected to lead 2025 fundraising effort; manages LinkedIn communications
- Organised first year players to manage care of around 40 polo horses alongside coaching staff and barn care, handled responsibilities including creating and serving on sub-teams to muck stalls, turn out, and feed horses
- Nominated by head coach for multi-year leadership program to improve leadership skills, learned management concepts and applied strategies to lead junior varsity and first year squads through practice and team lifts

**Pre-Professional Business Fraternity (Phi Chi Theta)** – *DEI Chair* | Ithaca, NY **Nov. 2023-present**

- Delivered weekly presentations of consulting cases in real estate, fintech, marketing, and hospitality; researched and created stock pitches, developed basic understandings in accounting and Microsoft Suite
- Spearheaded recruitment committee overseeing 200+ applicants, created events including information sessions and panels that aligned with the fraternity's inclusivity and diversity initiatives

**Model United Nations Club** – *Parliamentarian, Executive Staff, & Chair* | Fayetteville, NY **Sept. 2019-Jun. 2023**

- Coordinated & executively managed 600+ person conference at Syracuse University, personally created & ran new training conference, led recruitment efforts to increase total M.U.N. club membership by over 30%
- Networked with local businesses to connect with donors and increase annual budget, led weekly meetings for club throughout entire year, managed social media accounts to promote the club and different conferences

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## ADDITIONAL INFORMATION

- **Skills:** Proficient in Entrata; Beginner in MS365, Xero, TaxSlayer; Experienced in social media marketing
- **Languages:** English (native), Spanish (fluent, heritage)
- **Programs:** Make a Play Foundation (2025 Undergraduate Fellow), IMFx Debt Management, Reporting and Investors Relations; IMFx Monetary Policy Analysis & Forecasting
- **Interests:** Piano, Second-hand book shopping, Formula 1, Ancient history, Creative writing

# KAITLYN HOU

[kaitlynhou@college.harvard.edu](mailto:kaitlynhou@college.harvard.edu) | 972-638-9676 | [linkedin.com/in/kaitlynhou/](https://www.linkedin.com/in/kaitlynhou/)

## EDUCATION

**Harvard University** – Cambridge, MA

B.A. in Applied Mathematics and History | Secondary in Statistics

**GPA: 3.533/4.0**

Anticipated Graduation: May 2027

- **Accomplishments:** NCAA Division 1 Student-Athlete (Harvard-Radcliffe Heavyweight Rowing)
- **Relevant Courses:** Intermediate Microeconomics, Linear Algebra and Differential Equations, Multivariable Calculus, Introduction to Probability, Introduction to Statistical Inference, Introduction to Macroeconomics

## EXPERIENCE

**Make a Play Foundation (MAP)** – *Undergraduate Fellow* | New York, NY

**September 2024-Present**

- Selected to participate in an exclusive 2-part fellowship designed to prepare under-resourced college athletes for professional success at leading companies, receiving 20+ hours of interview preparation and participating in multiple case competitions with Fortune 500 companies

**Selected Case Experience:**

- **Executing a valuation analysis of a new HVAC company aligning with Warburg Pincus' investment strategy (ongoing)**
  - Advising Warburg on a potential HVAC company acquisition by developing a 3-statement financial model to forecast the income statement, balance sheet, and cash flow projections over a 5-year horizon
  - Collaborating with a high-performing team of 6 to conduct a comparable company analysis, validate DCF assumptions, and develop 5 key financial assumptions to forecast critical business drivers
  - Executing the final deliverable of a comprehensive pitchbook and consolidated master document to Warburg Pincus

**Harvard Center for History and Economics** – *Prize Fellow* | Cambridge, MA

**September 2024-Present**

- Awarded a prestigious fellowship to conduct a year-long research project analyzing Chinese women workers' contributions to British Malaya's development in the early 20th century
- Presented findings to leading professors and researchers at Harvard, the University of Cambridge, and Sciences Po, facilitating 7 research discussions regarding the growth of Southeast Asia
- Worked with historians from Harvard's Asia Center, the Harvard-Yenching Institute, and the Schlesinger Library to enhance historical resources on labor and gender studies in Asia for scholars worldwide

**Harvard Business School** – *Research Assistant* | Cambridge, MA

**June 2024-September 2024**

- Conducted in-depth historical research on the 1997 Asian Financial Crisis and the global dollar system for Professor Matthew Fibiger's forthcoming book, analyzing 300+ finance publications in the Baker Library archives
- Built and modeled the first comprehensive dataset of historical current account balances for 105 countries, utilizing statistical and modeling techniques to uncover key trends in Global South economies
- Delivered a project presentation to 90+ Harvard Business School students in the Business, Government, and International Economy course, utilizing the case-study format to facilitate in-depth discourse on Asia and the global markets

**Boeing** – *Financial Planning and Analysis Intern* | Plano, TX

**June 2021-August 2021**

- Designed and implemented a competitor analysis capstone project leveraging machine learning frameworks (TensorFlow and PyTorch) alongside strategic S.W.O.T. analysis to deliver actionable insights on 15 rival companies
- Supported the development of forecasts for future budgeting and financial accounts totaling ~\$20 million, delivering key takeaways to the CEO of Boeing Global Services

## LEADERSHIP & COMMUNITY DEVELOPMENT

**Harvard-Radcliffe Heavyweight Rowing** – *NCAA Division 1 Coxswain* | Cambridge, MA

**August 2023-Present**

- Dedicate over 20 hours a week to training and competition in both fall and spring semesters, spearheading 60+ pre-practice meetings with the coaching staff to strategize and align technical objectives for optimal team performance
- Served as the 4th Varsity Coxswain for Harvard Heavyweight Men's Rowing during the 2024 racing season, leading a crew of 8 rowers for competitive success at intercollegiate regattas
- Initiated enhanced media efforts by capturing professional photographs and videos during winter training season, engaging over 60,000 viewers across social media platforms

**Harvard Review of Philosophy** – *Editor* | Cambridge, MA

**September 2023-Present**

- Developed and executed 4 targeted fundraising strategies, resulting in a nearly twofold increase in the review's financial resources
- Curated contributions from esteemed philosophers and oversaw the editorial process for the world's only printed, student-run professional journal of philosophy
- Aided the publication of Harvard's inaugural philosophy magazine, *Zeitgeist*, with a focus on authoring and curating content for the "Philosophy of Technology" column

**Be the Light Youth Association (BTL)** – *Advisory Board Member* | Plano, TX

**May 2023-Present**

- Co-led a 501(c)(3) nonprofit organization dedicated to organizing speech and debate workshops to fundraise for disadvantaged children, successfully raising over \$130,000 for various charitable initiatives in the greater Dallas community
- Provide strategic guidance on the nonprofit's annual growth objectives, working in partnership with administrators from the Plano Independent School District and the Plano Mayor's Office to enhance the organization's outreach and impact

## SKILLS & INTERESTS

**Technical:** Machine learning, Python, Matplotlib, Java, R, SQL, Excel

**Languages:** Mandarin, French (intermediate)

**Interests:** Emerging markets, history of financial crises, running, and rock bands

# KENNEDY CHEUNG

(503) 270-9591 • [kennedycheung@uchicago.edu](mailto:kennedycheung@uchicago.edu)

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## EDUCATION

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**University of Chicago – Chicago, IL** **GPA: 3.5/4.0**  
B.A. in Economics | Minor in Quantitative Social Analysis | ACT/SAT: 33/1490 Graduation Year: 2027

- Activities and Societies: Varsity Volleyball, Odyssey Scholar, Quest+, Women in Business, Rogers Scholars Program in Finance, Trott Business Program, Forté Career Ready Certificate program, Moneythink
- Relevant Courses: Financial Accounting, Principles of Microeconomics, Economics for Everyone: Micro, Introduction to Computer Science 1, Calculus 2, Principles of Macroeconomics, Statistical Methods and Applications, Archival Research in London, Inquiry-based Exploration of Biology, Global Warming: Understanding the Forecast
- Wall Street Prep Education by 2025: Accounting Crash Course, Investment Banking Interview Guide & Soft Skills

**International School of Beaverton – Portland, OR** **GPA: 4.48 /4.0**  
International Baccalaureate Diploma Graduation Year: 2023

- Accomplishments: Oregon State Seal of Biliteracy: Mandarin (2023)
- Relevant Courses: IB HL Analysis and Approaches, IB SL Mandarin, IB HL Biology, IB SL Chemistry

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## PROFESSIONAL EXPERIENCE

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**University of Chicago Statistics Department – Teaching Assistant** | Chicago, IL **09/2024 – Present**

- Assist in the preparation of course materials, including handouts, practice problems, and supplementary resources, to enhance student understanding and engagement.
- Facilitate mandatory discussion sections for two small groups of 15–20 students each, reinforcing key statistical concepts taught in lectures and creating an interactive environment for collaborative learning and deeper comprehension.

**National Space Society – Research Assistant** | Remote **07/2024 – 09/2024**

- Supported research to expand the pilot educational program, spUN debates, by exploring funding growth strategies and optimizing budget allocation.
- Developed marketing plans/pursued partnerships with universities and other debate programs to broaden program reach.

**Becker Friedman Institute – Summer Fellow** | Chicago, IL **06/2024 – 07/2024**

- Participated in a comprehensive program combining virtual and in-person research exposure, including a week-long Stata bootcamp, sessions about public policy at the Hutchins Center at Brookings (Washington, DC), and introductory statistics, finance and microeconomics at Chicago Booth (Chicago).
- Assisted in ongoing research projects by preparing datasets for analysis, including data cleaning; conducted statistical analyses and created visual representations of data trends and findings using Stata to support project conclusions.

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## LEADERSHIP & COMMUNITY DEVELOPMENT

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**Warburg Pincus Investment Banking Case Competition – MAP Participant** | New York, NY (Remote) **12/2024 – Present**  
Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy**
  - Advising Warburg on the potential acquisition of an 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
  - Collaborating with a high-impact team of 5 pre-professionals to produce a comparable company analysis, DCF sense check & 5 financial assumptions to forecast key business drivers that will impact financials
  - Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team

**Trott Business Program – Member** | Chicago, IL **06/2024 – Present**

- Selective, three-year program focused on building business acumen through weekly workshops, including Training the Street, and coursework at the Chicago Booth School of Business

**Make A Play Foundation (MAP) – Diamond League Fellow (Fall '24)** | Remote **09/2024 – 11/2024**

- Participated in a 2-part fellowship for second-year college athletes from under-resourced backgrounds looking to prepare for success in financial services, completing 3 modules on interview preparation and business communications
- Competed in 3 group mock interviews against 50+ other college athletes, receiving a 'very strong' rating in at least 2 of the interviews, advancing to Phase 2 of the fellowship ("the team competition") with Warburg's Human Capital Team

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## ADDITIONAL SKILLS AND INTERESTS

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- Skills and Language(s): Mandarin (reading and writing, limited professional proficiency), data cleaning, statistical analysis
- Programs: Stata, Python, R (limited working knowledge)
- Professional and Other Interests: Investment Banking (Healthcare, Energy and Natural Resources, TMT), Research, Global Economics and Market Trends, Mentorship and Leadership Development for Disadvantaged Youth

# KYLER KING

[LINKEDIN.COM/IN/KYLERKING23/](https://www.linkedin.com/in/kylerking23/) • (615) 900-6764 • [KYLERDOTKING@GMAIL.COM](mailto:KYLERDOTKING@GMAIL.COM)

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## EDUCATION

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**Washington University in St. Louis** – St. Louis, MO **GPA: 3.73/4.0**  
B.S. in Business and Administration; Intended Minor in Computer Science | ACT: 34 Graduation Year: May 2027  
● Accomplishments: NCAA Student-Athlete (Football); Class of 2027 William H. Danforth Merit Scholar; Dean's List  
● Wall Street Prep Education by 2025: Accounting Crash Course, Investment Banking Interview Guide & Soft Skills

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## PROFESSIONAL EXPERIENCE

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**Warburg Pincus Investment Banking Case Competition** – *MAP Participant* | Remote **December 2024 – Present**  
Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy**
  - Collaborating with a small deal team of peers to advise Warburg Pincus on the potential acquisition of a new HVAC company, completing ~20% of the project by leading the “control phase” workstream requiring me to build our cash flow statement + perform a ‘sense check’ on our financial model.
  - Performed sense checks on key ratios including EBIT margin, sales growth over the forecast period and in the steady state, and return on invested capital, to swiftly locate and remove financial model errors for my team.
  - Building my team’s cash flow statement in under 1 week, applying the lessons learned from ~5 hours of instruction on Wall Street Prep (Chapter 6: The Cash Flow Statement) to provide aggregate data regarding all inflows/outflows from our proposed company.

**WashU Recreation** – *Intramural Sports Referee* | St. Louis, MO **January 2024 – Present**  
● Facilitate intramural games of basketball and volleyball among students, ensuring player safety.  
● Lead matches by enforcing rules, enforcing regulations, and providing accurate scores.

**Arch Consulting: Hasbro Case Competition** – *Participant* | St. Louis, MO **February 2024 – May 2024**  
● Analyzed the toy industry and presented ideas on potential improvements to Hasbro’s sales approach.  
● Proposed VR games and educational AI-implemented toys for children estimating a profit of over \$15 million within the first year.  
● Collaborated with 2 Arch Consulting Analysts to understand how to approach these problems and analyze cases.

**Black Sheep Marketing** – *Student Marketing Associate* | St. Louis, MO **January 2024 – May 2024**  
● Organized events to promote and generate webpage traffic for local businesses looking to target the college student demographic.

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## LEADERSHIP & COMMUNITY DEVELOPMENT

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**Sixth Street** – *Early Insights Program Participant* | San Francisco, CA **March 2025 – March 2025**  
● Selected as 1 of a select few to participate in a 3-day event designed to learn more about the alternative investment industry

**WashU Varsity Football** – *Student-Athlete* | St. Louis, MO **August 2023 – Present**  
● Dedicate 25+ hours a week for practices, lifts, film sessions, games, travel, and rehabilitation.  
● Provide thoughtful leadership that is inclusive, transparent & empowering & supports our goals on/off the field.  
● Developing a results-oriented focus & skills in critical thinking, accountability, resiliency, teamwork, and time management.

**WashU Finding Finance** – *Active Member* | St. Louis, MO **August 2023 – Present**  
● Share career advancement opportunities with a community of students interested in business and finance.

**WashU Student-Athlete Advisory Committee** – *Spirit Executive* | St. Louis, MO **August 2023 – Present**  
● Collaborate with other executives to advocate for athletes and generate participation and excitement about athletic events.  
● Coordinate events and prepare to host athletes for occasions such as game nights, formals, and the annual awards banquet.

**Make A Play Foundation (MAP)** – *Diamond League Fellow* | Remote | Rating: Phase 2 **September 2024 – November 2024**  
● Participated in a 2-part fellowship for second-year college athletes from under-resourced backgrounds looking to prepare for success in financial services, completing 3 modules on interview preparation and business communications.

**Independence Black Student Union** – *Co-Founder* | Spring Hill, TN **August 2021 – May 2023**  
● Created an open and safe community for African American, and other, students to gather and spark dialogue about experiences, feelings, and potential solutions to the current social climate in our city and communities.

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## ADDITIONAL SKILLS

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- Skills and Language(s): Agile Project Management | Scrum Methodology | Tuckman’s 5 Stages of Group Development

## Olivia Martin

[linkedin.com/in/liv-martin-7b096230b](https://www.linkedin.com/in/liv-martin-7b096230b) | [L1v@stanford.edu](mailto:L1v@stanford.edu) | 07539222083

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### EDUCATION

**Stanford University**, Stanford, CA

**August 2023 - Expected May 2027**

*Intended majors in Political Science or International Relations (3.83 GPA)*

- **Relevant Coursework:** Entrepreneurship Principles & Perspectives, Calculus, Statistical Methods, Principles of Economics

**Cranleigh Senior School**, Cranleigh, EN

- Field hockey, Track & field, Swimming, Netball, Tennis and Indoor hockey
  - A Levels: Business (A), History (A), Biology (B)
  - GCSE's: All A\* and one A
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### WORK EXPERIENCE

**Jones Lang LaSalle**, London, EN

**July 2024 - August 2024**

Commercial Real Estate Intern

- Prepared 3 presentations and new immersive ideas to engage with 3 separate clients, creating efficient and interactive experience
- Enhanced proficiency in Microsoft Excel for business applications such as cash flow and forecasts, gaining insight into data handling, financial modeling, and enabling clients to strategically plan their relocation and select our firm to facilitate their transition
- Shadowed a corporate real estate associate in sales processes and client meetings, enhancing communication and client interaction skills

**SavSim**, remote

**June 2022 - August 2022**

Social Media Assistant

- Learnt to monitor social media analytics to adjust strategies for optimal audience reach and maximize engagement levels
- Developed and managed social media content on Instagram, contributing to new ideas in order to enhance SavSim Conservation's online presence

**RugbyPass**, remote

Social Media Manager

**July 2021 - August 2021**

- Edited and uploaded RugbyPass content, contributing to their social media expansion during the 2021 British Lions Rugby series with videos reaching up to 500,000 views
  - Analyzed data to adapt to target audiences, enhancing visibility and increasing engagement
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### LEADERSHIP EXPERIENCE AND EXTRACURRICULAR ACTIVITIES

**Stanford University Division I Varsity Field Hockey Team**

**August 2023 - Present**

*Student-Athlete*

- Selected to be on the Stanford varsity field hockey team, including 25 members
- Balance 20+ hours a week and commit daily as a leader to quick problem-solving, effective communication, teamwork, and the ability to perform under high-pressure situations with discipline and resilience, leading to ACC tournament 2024

**Surbiton Hockey and Cranleigh Field Hockey Team**

- Since 14 competing alongside adults, training with Surbiton premier league team, National Champions in 2021, Captain of Cranleigh team 2022-2023, reaching the indoor national title game three times

**Women in Finance**

*Participant*

- Active member of the Women in Finance Club at Stanford University, participating in networking events and immersing myself in industry discussions and initiatives focused on empowering women
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### ADDITIONAL INFORMATION

**Awards and Honors:** Academic Athlete award 2022 and All Rounder Sporting award 2023 at Cranleigh School, finished top 5 in A Level History Coursework with an A\*, two time Cranleigh MVP 2021-2022

**Interests:** International Relations, Financial Analysis of Market Trends, Fitness and Health, Event Planning, Sustainability

# SAMUEL MACEO MARSHALL

[LINKEDIN PROFILE](#) • (412) 607-9870 • [MACEO@UCHICAGO.EDU](mailto:MACEO@UCHICAGO.EDU)

## EDUCATION

The University of Chicago | Trott Business Program – Chicago, IL

GPA: 3.6/4.0

Bachelor of Arts in Business Economics and Computer Science

Anticipated Graduation: Spring 2027

- Accomplishments: Varsity Football, MWC Academic All-American, KAPPA Scholarship Award Winner, National Honors Society
- Relevant Courses: Financial Accounting, TTS: Valuation Fundamentals, Computer Science I & II
- Wall Street Prep Education by 2025: Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

## PROFESSIONAL EXPERIENCE

CharacTour – *Software Engineering Intern* | Chicago, IL

June 2024 – August 2024

- Extracted data from TikTok and other platforms via web scraping APIs to improve recommendation algorithms
- Designed and implemented personality quizzes in Python to enhance user engagement on CharacTour's website, ensuring a diverse and interactive user experience
- Utilized AI prompt engineering to generate engaging character descriptions enriching user experience

Party on Butler (Pittsburgh's #1 Party Boutique) – *Business Associate* | Pittsburgh, PA

May 2023 – August 2024

- Coordinated with customers in-store, offering advice and recommendations to meet their event decor needs
- Prepared and assembled balloon arches along with other event decor in collaboration with a team of coworkers, meeting tight deadlines
- Managed inventory and restocked supplies to ensure a well-organized and fully stocked store

Appalachia Mission Trip – *Mission Trip Volunteer Leader* | Hazard, KY

June 2022

- Demonstrated leadership skills by guiding and motivating team members to accomplish project goals
- Coordinated and supervised the 1.5-week construction of a prayer garden at a summer camp
- Engaged in community outreach initiatives, contributing to 5 home renovation projects benefiting local residents

## LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – *Incoming Formula 1 Fellow (Winter '25)* | Remote | Rating: Phase 1

January 2025 – Present

- Participating in a 2-part fellowship for high-achieving college athletes from under-resourced backgrounds looking to prepare for professional success in finance-revenue businesses, completing 3 modules on interview preparation and business communications
- Competing in 3 group mock interviews against 100+ other college athletes to sharpen behavioral and technical interview skills
- Attending bi-weekly virtual events with leading companies in finance (i.e., Bank of America, Evercore, Guggenheim, Morgan Stanley, Sixth Street, Wells Fargo) to deepen my understanding of the skills required to achieve professional success in Corporate America and beyond

Warburg Pincus Investment Banking Case Competition – *MAP Participant* | New York, NY (Remote)

December 2024 – Present

Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy (ongoing)**
  - Collaborating with a small deal team of peers to advise Warburg Pincus on the potential acquisition of a new HVAC company, completing ~20% + formally closing the project by creating our investment memorandum & due diligence questionnaire responses
  - Creating a 10-page investment memorandum, consolidating 5+ work streams and 20+ hours of due diligence into a final PowerPoint (i.e., executive summary, company & industry overview) to outline well-organized terms of a potential investment from Warburg
  - Developing formal responses to Warburg's 2-page due diligence questionnaire (DDQ), consulting with my response team to centralize our answers into a single content library in under 1 week, adopting an agile workflow to ensure we answered each question succinctly

Black Letter-Winning Athletes Coalition – *Member* | Chicago, IL

September 2023 – Present

- Volunteering at the Hyde Park Food Pantry, assisting in distributing food to community members in need
- Contributing to discussions on coalition goals and initiatives, and fostered camaraderie through social events
- Engaging in alumni career panels, engaging with alumni student-athletes to gain insights into their academic and athletic journeys and subsequent professional careers

University of Chicago Varsity Football – *NCAA Student-Athlete (Defensive End)* | Chicago, IL

August 2023 – Present

- Balanced 25+ hours per week of practice, film studies, and competition in addition to rigorous academic courses
- Member of Maroons of Character Club by the Hyde Park Institute

Black Student Union – *Central Catholic HS* – *President* | Pittsburgh, PA

August 2022 – May 2023

- Scheduled and rallied peers for bi-weekly meetings
- Organized 4 trips to relevant historical sites, including the Museum of African American History and Culture, with an unforgettable visit to the White House
- Developed partnership with UPMC Mercy hospital to deliver gift boxes during Christmas to hospitalized children

## PERSONAL

- Skills: Python, Linux, Microsoft Excel, PowerPoint, Conversational in Spanish
- Interests: Video Games, Desserts, Cloud Rap, Artificial Intelligence, Stocks, Sudoku, Traveling, Weightlifting
- Programs: SEO Career, Make-A-Play Foundation (MAP)

# MAGGIE NI

[magni@wharton.upenn.edu](mailto:magni@wharton.upenn.edu) | (281)-323-5252

## EDUCATION

The Wharton School at the University of Pennsylvania | Philadelphia, PA

Anticipated Graduation: May 2027

- Candidate for Bachelor of Science in Economics
- Cumulative GPA: 3.85/4.0 | Concentration: Finance & Healthcare Management
- Relevant Courses: Corporate Finance; Accounting & Financial Report; Business Communications; Healthcare Systems

## EXPERIENCE

Make A Play Foundation (MAP) – Undergraduate Fellow

January 2024 – Present

- Selected to participate in an exclusive 2-part fellowship designed to prepare under-resourced college athletes for professional success.

Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg Pincus's investment strategy (ongoing)**
  - Collaborating with a high-impact team of 5 pre-professionals to design a 3-statement model and produce a comparable company analysis, DCF sense check & 5 financial assumptions to forecast key business drivers that will impact our financials.
  - Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team.
- **Co-created an agile transformation approach to introduce a more accessible housing system to Wells Fargo (closed)**
  - Collaborated with a team of high-performing athletes to introduce new processes that improve the housing experience for residents (i.e., enhanced service delivery) to create innovative pathways for upward mobility.
  - Transformed the team's current state analysis into a final 2-page recommendation report to drive implementation of our strategy across the bank, communicating the value of our strategy through a pitch deck/final presentation.

Raymond James – Investment Banking Insights Selected Participant

October 2024 – Present

- Engaging in 3 learning sessions focused on how associates help corporations raise capital, issue shares of stock in an IPO, provide financial consulting services, and negotiate a merger or acquisition; selected as 1 of 250 students.
- Undertaking additional exercises, including a sample strategic company analysis, to further develop expertise and experience in business analysis.

Student Athlete Abroad – Strategic Consulting Intern, Makedonikos Football Club

June 2024 – July 2024

- Analyzed challenges and researched strategies using club data to enhance the internal communication system between Makedonikos FC's administration and employees, resulting in improved sustainable information flow and employee engagement.
- Delivered a slide deck and an 8-page report outlining research and implementation methods for proposed solutions, including video tutorials; materials were translated into Greek.

Economy League's Greater Philadelphia Leadership Exchange Client Project – Participant

August 2023 – December 2023

- Oversaw a team of 10 to increase the client's scholarship fund, supporting their equity and inclusion commitment for a conference reaching over 1,500 Philadelphian leaders.
- Led the design conceptualization and execution of presentation slides, resulting in a visually cohesive and effective representation of information for the client.

## LEADERSHIP & ACTIVITIES

NCAA Division 1 Student Athlete – Varsity Women's Golf

August 2023 – Present

- Commitment of 25+ hours per week practicing and competing, qualifying for top 5 within the team for all tournaments freshmen year.
- Sole freshman to earn 2024 All-Ivy Honors, having the third-best three-round score by a Penn player at the Ivy League Championship.

Chess Club – Member, Volunteer Coach

October 2023 – Present

- Providing weekly coaching sessions, mentoring elementary students of different skill levels to develop effective tactics.
- Structuring personalized lessons and adopt various teaching methods to communicate effectively for each child.

Penn Impact Investing – Projects Committee, Endemic Venture Capital

September 2024 – Present

- Conducting a comprehensive assessment of the venture capital ecosystem within 574 Native Sovereign Nations, identifying key growth opportunities and investment challenges.
- Exploring co-investment opportunities with Tribal finance entities to align venture capital with Indigenous financial practices.

## AWARDS

- **Women's Golf Coaches Association All-American Scholars** May 2024
- **Distinction Exemplary Student Leader** – (6 out of 732 students) May 2023
- **Rolex Scholastic Junior Golf All-American & Honorable Mention Team** – (top 25 in the USA) November 2022

## SKILLS AND INTERESTS

- Skills: Agile Project Management, Scrum Methodology, Creating Business Presentations, Analytical, Meticulous
- Interests: Woman FIDE Master title in chess, Pathophysiology, Reading, Bracelet-making, Origami

# MARC P. GARRAUD

[LINKEDIN PROFILE](#) • (781) 715-7330 • [MGARRAUD27@AMHERST.EDU](mailto:MGARRAUD27@AMHERST.EDU)

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## EDUCATION

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<b>Amherst College</b> – Amherst, MA B.S. in Psychology and Mathematics ● <u>Accomplishments</u> : Student-Athlete (Men's Basketball)	<b>GPA: 3.585/4.0</b> Graduation Year: 2027
<b>Noble and Greenough</b> – Dedham, MA HS Diploma	<b>GPA: 3.6/4.0</b> Graduation Year: 2023

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## PROFESSIONAL EXPERIENCE

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<b>Nike Basketball Camp</b> – <i>Camp Coach</i>   Amherst, MA ● Assisted in organizing campers from the ages of 5-13 into organized groups to learn the fundamentals of basketball ● Responsible for communicating and coordinating pick up and drop off with parents	<b>June 2024 – August 2024</b>
<b>Amherst College</b> – <i>Special Operations Assistant</i>   Amherst, MA ● Designed advertising and developed & managed social media content management ● Assisted with key distribution, inventory, and sorting ● Answered incoming phone calls and greets office visitors	<b>June 2024 – August 2024</b>
<b>Dana Barros Basketball Club</b> – <i>Camp Counselor</i>   Stoughton, MA ● Managed over 200+ kids into groups throughout the complex to complete basketball drills ● Coordinated pick up, drop off, and lunch by communicating with parents	<b>July 2022 – August 2022</b>

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## LEADERSHIP & COMMUNITY DEVELOPMENT

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<b>Make A Play Foundation (MAP)</b> – <i>Incoming Formula 1 Fellow (Winter '25)</i>   Remote   Rating: Phase 1 ● Participating in a 2-part fellowship for first-year college athletes from under-resourced backgrounds looking to prepare for success in <u>finance-revenue businesses</u> , completing 3 modules on interview preparation and business communications ● Competing in 3 group mock interviews against 100+ other college athletes to sharpen behavioral + technical interview skills ● Attending bi-weekly virtual events with leading companies in finance (i.e., Bank of America, Evercore, Guggenheim, Morgan Stanley, Sixth Street, Wells Fargo) to deepen my understanding of the skills required to achieve professional success	<b>January 2025 – Present</b>
<b>Warburg Pincus Investment Banking Case Competition</b> – <i>MAP Participant</i>   Remote <u>Selected Case Experience</u> : ● <b>Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy</b> <ul style="list-style-type: none"><li>Collaborating with a small deal team of peers to advise Warburg Pincus on the potential acquisition of a new HVAC company, completing ~20% of the project by leading the “control phase” workstream requiring me to build our cash flow statement + perform a ‘sense check’ on our financial model</li><li>Performed sense checks on key ratios including EBIT margin, sales growth over the forecast period and in the steady state, and return on invested capital, to swiftly locate and remove financial model errors for my team</li><li>Building my team’s cash flow statement in under 1 week, applying the lessons learned from ~5 hours of instruction on Wall Street Prep (<u>Chapter 6: The Cash Flow Statement</u>) to provide aggregate data regarding all inflows/outflows from our proposed company</li></ul>	<b>December 2024 – Present</b>
<b>Amherst College Men's Basketball Team</b> – Student-Athlete   Amherst, MA ● Devoting 25+ hours a week to: practice/training, film sessions, individual/team meetings, games, tutoring, travel & service ● Providing thoughtful leadership that is inclusive, transparent & empowering & supports the team's on & off the court goals ● Developing a results-oriented focus & skills in: critical thinking, accountability, resiliency, teamwork, and time management	<b>August 2023 – Present</b>
<b>“SleeperSneaks”</b> – Owner   Lynn, MA ● Managed a self-run sneaker resell business ● Organized a Google Sheet to keep track of all sales and purchases ● Created and ran a social media page to advertise the business	<b>January 2023 – July 2023</b>
<b>Rwanda Service Trip</b> – <i>Student</i>   Kigali, Rwanda ● Developed a deep understanding of Rwanda's history and culture while doing service work in nearby neighborhoods ● Collaborated with peers of the Aghozo-Shalom Youth Village ● Improve the ASYV campus by assisting in labor work	<b>March 2023 – March 2023</b>

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## ADDITIONAL SKILLS

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- Interests: Interested in the history of psychology and psychoanalysis

# Meredith Holcomb

19209 Fenwick Crest, San Antonio, TX 78258

(210) 409-2295

[meredithholcomb@gmail.com](mailto:meredithholcomb@gmail.com)

## EDUCATION

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### University of Pennsylvania – WHARTON SCHOOL

Philadelphia, PA

Candidate for Bachelor of Science in Economics, Concentrations in Finance and Real Estate

May 2027

- GPA: 3.85/4.00
- Relevant Coursework: Real Estate Investments, Statistics, Finance, Accounting, Marketing, Negotiations
- **Division I Collegiate Swimmer**

### TMI Episcopal

San Antonio, TX

· GPA: 4.19/4.00; Class of 2023 Salutatorian

May 2023

- Varsity Swim Team; Varsity Team Captain; four-time Scholastic All-American, National Honor Society; Alkek Scholarship Recipient; Student Ambassador; VP of Latin Club

## PROFESSIONAL EXPERIENCE

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### Silver Ventures

San Antonio, TX

*Summer Analyst*

April 2024 - Aug 2024

- Conducted due diligence operations, constructed financial models, and analyzed risk to return of various asset classes.
- Performed comprehensive market research and feasibility analysis to support investment decisions.
- Assisted in the negotiations of real estate acquisitions.
- Collaborated with highly trained real estate professionals in the **Oxbow Development Group**.

### Private Swim Instructor

San Antonio, TX

*Self-Employed*

Jan 2019 - Aug 2024

- Coached proper swim techniques to young athletes, ages 4-13, while monitoring their improvement.
- Communicated with parents on progress, scheduling, and fees.
- Organized and managed swim competitions with surrounding summer league teams.

### Farm to Juice

San Antonio, TX

*Store Manager*

May 2022 - May 2023

- Assisted in managing the store's operations, its employees, inventory, and deliveries.
- Prepared freshly squeezed juices daily from raw/organic fruits and vegetables from local farms.

## ACTIVITIES AND LEADERSHIP

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### UPenn Varsity Swim and Dive Team – Team Captain

Philadelphia, PA 2023 - Present

- Employ effective time management skills with 20+ hours of training per week.
- Multiple practices per day while balancing school work.
- Representative of the **Women Athletics Association**, where I organize fundraisers and events for female athletes.

### Wharton Women Finance Club – Club Leader

Philadelphia, PA 2023 - Present

- Engage in stock pitch competitions, constructing financial models incorporating macroeconomic research.
- Organize and participate in finance workshops, gaining insights into investment strategies and portfolio management.
- Network with industry professionals and alumni, fostering connections and gaining mentorship in finance.

### Penn Athletic Wharton Leadership Association

Philadelphia, PA 2023 - Present

- Leadership workshops by industry professionals showing insights into the business world.
- Teamwork exercises involving different aspects of finance and managerial skills.

### Clash of Coders Robotics Team

San Antonio, TX 2018 - 2021

- Team manager for a non-profit robotics organization.
- Organized community service opportunities, mentor meetings, and field trips and was the point person for donation/funding projects and local competitions.
- Facilitated the creation of the engineering notebook and helped to document our robot's progress.

## INTERESTS AND VOLUNTEERING

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- **Interests:** Piano (14 years) and Violin (5 years), Arabic drumming, running, trying new foods, baking/cooking
- **Volunteer Work:** SNUGS Swim Program, Church Under the Bridge (200+ hours), Ukraine San Antonio, San Antonio Food Bank, Cofounder of the Basis Interact Club

# NICOLAS W. WEST

NICWEST@WHARTON.UPENN.EDU • 561-251-9086 • [WWW.LINKEDIN.COM/IN/NICOLAS-WEST](http://WWW.LINKEDIN.COM/IN/NICOLAS-WEST)

## EDUCATION

The Wharton School, University of Pennsylvania – Philadelphia, PA

Expected 2027

Candidate for Bachelor of Science in Economics: Concentrations in Behavioral Economics & Finance

- **GPA:** 3.3
- **Honors:** 1st Place HEMM Conference Case Competition & 1st Place Project Destined CRE Investment Competition
- **Relevant Coursework:** Business Statistics, Corporate Finance, Economics, Marketing, Law and Social Values, Negotiations

## PROFESSIONAL EXPERIENCE

LGBT+ VC – *Summer Cohort Fellow* | New York City, NY

May 2024 – Aug 2024

- Selected as 1 of 25 fellows for a prestigious Venture Capital Insights program, with an acceptance rate of 10%
- Prepared an investment memo using ROGUE framework to evaluate transportation and logistics industry, analyzing its regulatory environment, business model, and risks and mitigants to inform investment decisions
- Developed an investment thesis for LP presentations, targeting real estate, transportation and ESG-focused startups, with an emphasis on improving accessibility in the housing/rental market and enhancing urban opportunities
- Assisted in organizing the Prosperity Summit in New York City, bringing together 200+ LGBTQ+ professionals for impactful speaker engagements, networking opportunities, and collaborative discussions

Takeoff Institute – *Summer Fellow* | New York City, NY

Jun 2024 – Aug 2024

- Selected as 1 of 40 fellows in a professional development program for Black undergraduates, with an acceptance rate of 15%
- Led team of 5 in developing and presenting a diverse founder sourcing strategy recommendation for Notable Capital
- Created a comprehensive market map identifying college and professional organizations as key targets
- Performed a UX audit, researched VC DEI strategies, and facilitated 2 interviews with investment professionals

Crunchtime Software – *Business Development Representative Intern* | Atlanta, GA

Jun 2024 – Aug 2024

- Discovered back-office systems of 200+ mid-market, commercial, and enterprise restaurant brands using Zoom Phone and conducted 75+ cold calls, 30+ cold emails, and 20+ LinkedIn messages daily to qualify 34 Q3 target accounts for sales team
- Crafted training manual and delivered presentation on email copywriting and LinkedIn outreach for 10 current and incoming business development representatives resulting in 4 meetings booked amongst team within 20 days of training

## LEADERSHIP EXPERIENCE & EXTRACURRICULARS

University of Pennsylvania Track & Field Athlete – *Sprinter & Hurdler* | Philadelphia, PA

Aug 2023 - Present

- Dedicated 20 hours per week to practicing and strength conditioning, for both indoor and outdoor track and field seasons
- Completed 2 hours of daily prehab and rehab to maintain peak performance and prevent injuries
- Led warm-up routines for the hurdle team, fostering team preparedness and injury prevention

Black Ivy League Business Conference – *Special Events Chair* | Philadelphia, PA

May 2024 - Present

- Organizing a case competition for 175+ participants in collaboration with Black Wharton Consulting and Capital One
- Managing 5 volunteers responsible for team formation, timing, and fostering collaboration among participants
- Coordinating performance with UPenn's acapella group, Inspirations; negotiated with four other groups for cost efficiency and entertainment value, then optimized venue acoustics to accommodate the audience experience of 175+ attendees

UPENN Reach Social Media - *Consultant & Content Creation Committee* | Philadelphia, PA

Sep 2023 – May 2024

- Boosted TikTok brand Unfiltered to over 5 million views in 3 weeks by analyzing successful TikTok accounts, optimizing trivia content strategies and leveraging Ivy Leagues participants to drive reach, engagement, and audience interest
- Created college ambassador program along with 5 consultants for a wellness startup, Skylight, designing a comprehensive yearlong initiative including content strategies, pricing, timeline, and selection of 6 ambassadors

## SKILLS, PROFESSIONAL DEVELOPMENT & INTERESTS

- **Skills:** Microsoft Suite (Excel, PowerPoint, Word), Salesforce, ZoomInfo (CRM Tool), LinkedIn SalesNav (CRM Tool), Gong, Portuguese (Beginner)
- **Professional Development:** Goldman Sachs Wealth Management Emerging Leader Series, Make A Play King's Court Fellow, Make A Play Diamond League Fellow, Goldman Sachs Pride Possibilities Summit
- **Interests:** Content Creation, Competitive Reality Television, City Exploring, Beach Volleyball, R&B Music, Coconut Water

# NORINA KHANZADA

[WWW.LINKEDIN.COM/IN/NORINAKHANZADA](http://WWW.LINKEDIN.COM/IN/NORINAKHANZADA) • (201) 745-2223 • [nhk2131@barnard.edu](mailto:nhk2131@barnard.edu)

## EDUCATION

**Columbia University, Barnard College** – New York, NY  
B.A. in Economics | Minor in Psychology

**GPA: 3.70/4.00**  
Anticipated Graduation: 2027

- **Accomplishments:** Dean's List Honoree Spring 2024 and Fall 2024
- **Relevant Courses:** Economic Reasoning, Finance and Accounting, Calculus III, Macroeconomics, Microeconomics, Statistics.

## PROFESSIONAL EXPERIENCE

**Gym Elite Gymnastics** – *Team Coach* | Cliffside Park, NJ

**11/2020 – 08/2024**

- Coached recreational and competitive teams for children ages 4-13, mentoring athletes to reach their full potential through skill development, teamwork, and personalized training sessions.
- Conducted private and group sessions, emphasizing sportsmanship, discipline, and innovative lesson strategies to foster engagement and athletic improvement.
- Contributed to the gym's early-stage expansion by ensuring dependable operations, gaining firsthand experience in business development, and maintaining positive client relationships.

**Depop Online Store** – *Account Manager* | Self-Employed

**03/2020 – PRESENT**

- Created and continuously manage a successful Depop clothing store, tailoring and upgrading second-hand clothing by hand to align with current fashion trends, exhibiting a strong entrepreneurial spirit.
- Develop and execute marketing strategies, including targeted sales and promotions, to increase customer engagement and boost overall sales performance.
- Maintained an average profit margin of 87% in the past 2 years, achieving peak performance in summer 2023 selling 100+ items.

**Windsor Prep Tutoring** – *Tutor* | Cliffside Park, NJ

**06/2022 – 08/2024**

- Designed and implemented individualized lesson plans, tailoring instruction to meet student's unique learning needs and support their academic growth in math and English.
- Communicated with parents to align lessons with the student's educational goals, fostering communication and effective learning outcomes.
- Assessed student progress regularly and adapted teaching strategies to drive improvement and mastery of key concepts, showcasing adaptability and social analysis skills.

**Gotham City Diner** – *Hostess* | Cliffside Park, NJ

**06/2022 – 08/2022**

- Greeted and seated guests, creating a welcoming atmosphere to ensure a positive dining experience and enhance customer satisfaction.
- Memorized 75+ food and drink items, efficiently managing reservations and online orders to create smooth restaurant operations.
- Optimized table turnover by coordinating timely communication with staff, improving service flow and overall customer satisfaction.

## LEADERSHIP & COMMUNITY DEVELOPMENT

**Columbia Track and Field** – *Student-Athlete* | New York, NY

**09/2023 – PRESENT**

- Managing a rigorous training and competition schedule alongside academic responsibilities, demonstrating exceptional time management and discipline to excel in both areas.
- Dedicating 20+ hours weekly to year-round training and travel competitions, showcasing commitment and consistency to achieve athletic and academic goals.
- Maintaining strong communication with coaches and teammates, fostering teamwork and leadership to support continuous improvement.

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

**01/2025 – PRESENT**

- Selected to participate in an exclusive fellowship for high-achieving 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 eagerness to continue learning.
- Attend weekly virtual recruiting events with MAP's partners (Bank of America, J.P. Morgan, Guggenheim, Morgan Stanley, etc.), learning how to transform my experience as a student-athlete into a successful post-playing career at a leading company.

**Columbia Women's Business Society Bootcamp** – *Participant* | New York, NY

**10/2024 – 12/2024**

- Completed a 7-week Finance Bootcamp to gain in-depth knowledge of finance fundamentals and accounting basics.
- Built financial models such as Discounted Cash Flow and Leveraged Buyout as part of hands-on training, improving my proficiency in financial analysis and decision-making.

**Effective Altruism Fellowship** – *Club Member* | New York, NY

**09/2024 – 12/2024**

- Engaged in philosophical discussions to explore effective altruism principles, fostering a deeper understanding of maximizing positive impacts in global and local contexts.
- Analyzed diverse cause areas, including climate change, global development, and AI safety, to identify the most impactful opportunities for intervention.
- Collaborated with peers to develop critical thinking and actionable strategies, contributing to meaningful change by donating to high-impact organizations.

## SKILLS & INTERESTS

- **Skills:** Adobe Photoshop, Adobe Illustrator, iMovie, Final Cut Pro
- **Interests:** Guitar, Jazz, Music, Video Production, Real Estate, Photography, Philosophy, Journaling, Exercise Science, Fashion
- **Fun Fact:** I collect cassette tapes, mostly Frank Sinatra and albums from the 60s.
- **Biggest Sports Lesson:** Success comes from viewing obstacles as challenges to conquer, not fears to avoid.

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# REGANNE H. CHEANG

[LINKEDIN.COM/IN/REGANNE-CHEANG-7A7466261/](https://www.linkedin.com/in/reganne-cheang-7a7466261/) • (469) 771-4119 • [REGANNE@WHARTON.UPENN.EDU](mailto:REGANNE@WHARTON.UPENN.EDU)

## EDUCATION

University of Pennsylvania – Philadelphia, PA

B.S. in Economics | Concentration in Finance and Real Estate

Anticipated Graduation: May 2027

- Cumulative GPA: 3.2/4.0
- Accomplishments: NCAA Division I Athlete (Gymnastics), Ambassador of WAA (Women's Athletic Association), Member of Student-Athletes in Finance
- Relevant Courses: Legal Studies, Business Economics, Business and You, Business Economics II, Introduction to Finance, Introduction to Business Statistics, Introduction to Management, Business Communication
- Industry Education by Spring 2024: 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101

## EXPERIENCE

Wells Fargo – *Housing Affordability Student Analyst; Scrum Master* | New York, NY (Remote)

February 2024 – March 2024

- Achieved the role of “scrum master,” given to 30 top performers from MAP's fellowship of 1,250+ high-achieving college athletes, tasked with managing a team of 5 responsible for developing a strategy to expand affordable rental housing opportunities in URM communities
- 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 Wells' leadership team in March to formally close the project & transfer our solution(s)
- Directed weekly discussions with my team to determine the scope of ~10 workstreams (i.e., balanced scorecard, feasibility study, buyer persona, marketing strategy, benchmarking analysis, budget, user journey map), resulting in a 40% faster turnaround process for the team

Morgan Stanley – *Fixed Income Student Analyst; Scrum Master* | New York, NY (Remote)

March 2024 – May 2024

- Achieved the role of “scrum master,” given to 15 top performers from MAP's fellowship of 1,250+ high-achieving college athletes, leading a team of 5 first-year athletes tasked with delivering an investment thesis to MS's Fixed Income team + Managing Director, Stephen Dance
- Team placed first in the preliminary round and advanced to the final round of the MAP x Morgan Stanley case competition

Make A Play Foundation – *MAP Women's Initiative Network Fellow* | New York, NY (Remote)

September 2024 – Present

- Selected as 1 of 50 sophomores to participate in a fellowship designed to prepare women athletes for careers in banking and consulting
- Refine problem-solving skills by participating in a case competition sponsored by Oliver Wyman's Campus Recruiting & Diversity Teams
- Receive 20+ hours of targeted case interview prep, professional development coaching & industry-specific training for competitive roles

## LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – *NXT Fellow '23 - '24 (Cohort)* | Remote

December 2023 – May 2024

- Selected as 1 of 100 college athletes to participate in a fellowship that prepares first-year under resourced athletes for professional success
- Receive 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles

University of Pennsylvania Varsity Gymnastics Team – *NCAA Division I Student-Athlete* | Philadelphia, PA

August 2023 – Present

- Foster teamwork and increased synergy within the level 10 team, organizing team events & activities to enhance team cooperation/unity
- Competed and practiced ~20 hours a week, significantly improving time management and teamwork skills

Penn Athletics Wharton Leadership Academy – *Member* | Philadelphia, PA

August 2023 – Present

- Contributed to packing over 1,000 meals for underprivileged children globally, enhancing their access to nutritious food, and volunteered in a meaningful effort to address hunger and make a positive impact on the lives of those in need
- Ensured the proper packaging and storage of food and consistently packed over 40 boxes of food during each session, demonstrating dedication to efficient and organized distribution to those in need

Team Impact – *Representative* | Philadelphia, PA

August 2024 – Present

- Selected from a cohort of 23 to members to represent the organization
- Collaborated with team leadership to plan and execute events that integrated Team Impact initiatives, enhancing the experience of our Team Impact member

## NON-TECHNICAL SKILLS & INTERESTS

- Interests: Baking and reading | Languages: I speak Fluent English and Cantonese.

# RICHARD JIA

[LINKEDIN PROFILE](#) • (445) 456-0406 • [RICHJIA@WHARTON.UPENN.EDU](mailto:RICHJIA@WHARTON.UPENN.EDU)

## EDUCATION

**University of Pennsylvania (The Wharton School)** – Philadelphia, Pennsylvania **GPA: 3.92/4.0**  
Dual Degree Program in B.A. (Hons) in Anthropology & B.Sc (Hons) in Statistics and Finance | Minor in Data Science | SAT: 1510 **08/2023 - 05/2027**

- **Accomplishments:** 2024 Collegiate National Championship Winner, Joseph Wharton Scholars, Benjamin Franklin Scholars
- **Relevant Courses:** Penn Athletics Wharton Leadership Academy, Finance, Marketing, Management, Entrepreneurship
- **Wall Street Prep Education by 2025:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

## PROFESSIONAL EXPERIENCE

**Wharton Cypher Accelerator - Engagement Manager** | Philadelphia, Pennsylvania **09/2023 – Present**

- Managing relations with 400+ deep tech startup teams, including organizations like ETH Zurich, Merantix, and ConceptionX.
- Advanced blockchain services through collaboration with UNICEF, the International Telecom Union, GIGA, and AWS (Amazon Web Services).
- Conducted a presentation regarding promising medtech startup Pocketscribe to 200+ students/faculty at the Wharton Cypher Demo Day.

**Meredith Connell Law - Summer Assistant & Intern** | Auckland, New Zealand **03/2023 – 05/2023**

- Conducted legal research and analysis on OCE/EMEA international affairs and trade, assisting in case preparation and strategy development.
- Aided communication strategies, expanding social media reach to 5,000+ followers, and collaborated with E tū Workers Union and University of Auckland law clubs on events to enhance community engagement.
- Worked in the Te Kuhunga program, supporting 10 low income schools by organizing resources, workshops, and mentoring young students.

**New Zealand Parliamentary Support - General Intern** | Wellington, New Zealand **08/2022 – 02/2023**

- Assisted Naisi Chen (Member of Parliament) and Andrew Little (Minister of Health) with policy on youth health and educational services.
- Managed and executed strategic community outreach initiatives, organizing events for over 1,000 attendees to enhance public engagement.

**Toasted Coffee Roasters – Barista & FOH** | Auckland, New Zealand **12/2018 – 01/2023**

- Adapted to diverse skill sets as a barista and front-of-house team member, fostering a welcoming café atmosphere, enhancing customer satisfaction, and building valuable interpersonal and operational skills over a 4-year tenure.

## LEADERSHIP & COMMUNITY DEVELOPMENT

**Warburg Pincus Investment Banking Case Competition – MAP Participant** | New York, NY (Remote) **12/2024 – Present**  
**Selected Case Experience:**

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy (ongoing)**
  - Advising Warburg on the potential acquisition of an 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
  - Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team

**Make A Play Foundation (MAP) – Diamond League Fellow (Fall '24)** | Remote | Rating: Very Strong **09/2024 – 11/2024**

- Participated in a 2-part fellowship for second-year college athletes from under-resourced backgrounds looking to prepare for success in the financial services industry, completing 3 modules on interview preparation and business communications
- Competed in 3 group mock interviews against 50+ other college athletes, receiving a 'very strong' rating in at least 2 of the interviews, advancing to Phase 2 of the fellowship ("the team competition") with Warburg's Human Capital Team

**International and Division 1 Athlete – Athletics** | Philadelphia, Pennsylvania **02/2019 – Present**

- Member of the University of Pennsylvania Division 1 Varsity Men's Rowing Team.
- 2024 National Championship Winner, 2024 Ralph T. Jope Cup Winners, EARC Sprints Champions.
- Represented Team New Zealand at the U17 Australasian Championships and U16 FIBA Asia Pacific World Qualifiers.

**Collegiate Capital Partners - Penn Chapter (PUCP) – Project Lead** | Philadelphia, Pennsylvania **09/2023 – Present**

- Participating in client outreach and conducting sourcing on behalf of VC clients (Sequoia, ACME, etc.) with an aggregate of \$33.2B+ AUM.
- Project lead for both Sourcing and Diligence teams, actively identifying high-potential startups within the Philadelphia community and conducting thorough evaluations to deliver strategic insights for investment decisions.

**Wharton Investment Trading Group – Healthcare Analyst** | Philadelphia, Pennsylvania **09/2023 – Present**

- Utilized valuation techniques (comps, precedent transactions, DCF's, LBO's) and analyzed the effect of varying assumptions through sensitivity analyses and calculating spreads to make several hypothetical long and short investments.

**University of Cambridge Lead Researcher – Student Researcher** | Cambridge, UK **06/2022 - 10/2022**

- Awarded Cambridge International Research Interdisciplinary Scholarship worth £5000.
- Conducted research on mental health definition reconceptualization in New Zealand society following COVID-19's influence on mental illness in partnership with Professor Hande Güzel from the University of Cambridge.

## RESEARCH PROJECTS & PUBLICATIONS

**MENTAL HEALTH THROUGH THE LENS OF LAW** - <https://doi.org/10.47611/jsr.v11i3.1687> **09/2023**

**(RE)DEFINITION OF MENTAL HEALTH DISORDERS IN NEW ZEALAND AND WORLDWIDE** **05/2023**

- Awarded Youngest Speaker Ever at the BSA Medical Sociology Conference 2022

## NON-TECHNICAL SKILLS & INTERESTS

- **Skills and Language(s):** Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development
- **Interests:** Niche Sports, Coffee Making, Choir, Chess, Piano

# SOPHIE P. SLAYDEN

slayden@wharton.upenn.edu | 512.534.5660 | LinkedIn.com/in/SophieSlayden

## EDUCATION

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**University of Pennsylvania, The Wharton School**, Philadelphia, PA *May 2027*

Candidate for Bachelor of Science in Economics, Finance and Business Analytics Concentrations

- Cumulative GPA: 3.95/4.00
- NCAA Varsity Diver, Women's Swimming and Diving Team; All-American Scholar; Penn Athletics Wharton Leadership Academy Member

**Westlake High School**, Austin, Texas *May 2023*

Distinguished Achievement Diploma, *Summa Cum Laude*, STEM and Multidisciplinary Studies

- Varsity Swim & Dive Team Captain; Record Holder; All-American Diving (2020-23); All-State First Team (2020-23)
- United States Gold Presidential Volunteer Service Award; National Honor Society; Math Honor Society

## PROFESSIONAL EXPERIENCE

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**Jefferies** | *Incoming Asset Management Summer Analyst*, New York City, New York *June - August 2025*

**Girls Who Invest** | *Incoming Online Intensive Program Participant*, Virtual *February - August 2025*

**Asure Software** | *Financial Planning and Analysis Intern*, Austin, Texas *May - August 2024*

- Developed revenue spreadsheets for newly acquired business entities to identify key areas of success
- Selected relevant revenue models; applied product line data to forecast post-acquisition revenue and market trends
- Prepared detailed monthly financial reports for presentation to the Executive Board
- Generated individual monthly commission statements for 100+ Asure employees across all departments

**SGB PLLC** | *Research Intern*, Austin, Texas *May - August 2024*

- Learned and applied essential steps in IP portfolio due diligence for investments, mergers, acquisitions, and spinoffs
- Researched and completed case studies in Intellectual Property law and related administrative proceedings
- Gained insights into offensively and defensively leveraging administrative actions and US IP litigation

## LEADERSHIP & EXTRACURRICULARS

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**University of Pennsylvania Varsity Women's Swim and Dive Team** | *D1 Varsity Diver* *August 2023 - Present*

- Committed to academic and athletic excellence through effective time management while training 20+ hours weekly
- Qualified and competed in 2024 NCAA Zone A 1M and 3M Springboards

**Penn Women's Athletic Association** | *Executive Board Member* *October 2023 - Present*

- Leading, budgeting, and executing successful fundraising and community events as Internal Affairs Chair

**Wharton Undergraduate Private Equity and Venture Capital Club** | *Corporate Outreach Committee* *October 2023 - Present*

- Hosting and organizing "fireside chats" with Private Equity and Venture Capital leaders for Penn students
- Exceeding club goals in initiating cold contacts and retaining business leaders to speak before the Wharton community

**Wharton Women** | *Dollar Scholars Committee* *October 2023 - Present*

- Curating personal financial literacy curricula for at-risk Philadelphia youth
- Teaching financial literacy and advocating for professional experiences in West Philadelphia schools

**Wharton Undergraduate Hedge Fund Club** | *Long/Short Equities Committee* *October 2023 - Present*

- Developing and presenting comprehensive stock pitches and strategic investing plans concentrating on market trends, financial models, and risk assessments

## SKILLS

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Proficient in Microsoft Office Suite (Excel, PowerPoint, Word); Experienced with Salesforce; Foundational knowledge of Java

# SOPHIA C. ZHAO

[LINKEDIN](#) • (716) 524-0548 • [SOPHIAZHAO@UCHICAGO.EDU](mailto:SOPHIAZHAO@UCHICAGO.EDU)

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## EDUCATION

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The University of Chicago – Chicago, IL

GPA: 3.581/4.0

B.A. in Business Economics and Data Science | ACT: 33

Graduation Year: Spring 2027

- Accomplishments: CSCAA Scholar All-America, AP Capstone Diploma, High Honor Roll (2019-2023)

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## PROFESSIONAL EXPERIENCE

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CharacTour – AI and Data Science Intern | Chicago, IL (Remote)

June 2024 – August 2024

- Used Python's Pandas to conduct statistical analysis of user data, leverage large language models including Meta's Llama3, and use advanced NLP techniques in machine learning to encode marketing messaging

Jones Beach/NY State Parks – Ocean Lifeguard | Long Island, NY

June 2023 – August 2023

- Collaborated with a team of lifeguards, coordinating efforts through effective communication and leadership to manage emergency situations by applying structured problem-solving skills to assess risks and implement effective solutions swiftly

Kumon – Instructor | Melville, NY

June 2022 – August 2022

- Worked directly with students to deliver personalized instruction, adapting teaching strategies to meet diverse learning styles
- Communicated effectively across multiple audiences including students, parents, instructors, and administrators to benefit educational outcomes and ensure student progress and success

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## LEADERSHIP & COMMUNITY DEVELOPMENT

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Make A Play Foundation (MAP) – Incoming Formula 1 Fellow (Winter '25) | Remote | Rating: Phase 1

January 2025 – Present

- Participating in a 2-part fellowship for high-achieving college athletes looking to prepare for successful careers in finance-revenue businesses, completing 3 modules on interview preparation and business communications
- Competing in 3 group mock interviews against 100+ other college athletes to sharpen behavioral + technical interview skills
- Attending bi-weekly virtual events with leading companies in finance (i.e., Bank of America, Evercore, Guggenheim, Morgan Stanley, Sixth Street, Wells Fargo) to deepen my understanding of the skills required to achieve professional success

Warburg Pincus Investment Banking Case Competition – MAP Participant | New York, NY

December 2024 – Present

Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy**
  - Advising Warburg on the potential acquisition of an 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
  - Collaborating with a high-impact team of 5 pre-professionals to produce a comparable company analysis, DCF sense check & 5 financial assumptions to forecast key business drivers that will impact financials
  - Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team

Collegiate Varsity Swim – Team Member | Chicago, IL

September 2024 – Present

- Currently competing as a collegiate athlete, balancing a rigorous academic course load with a demanding 20-hour per week training schedule, demonstrating strong time management and discipline
- Providing thoughtful leadership that is inclusive, transparent & empowering & supports the team's goal to develop teammates inside & outside the pool
- Developing a results-oriented focus & skills in: communication, critical thinking, accountability, resiliency, teamwork, and time management

High School Varsity Swim – Team Member | Dix Hills, NY

September 2018 – November 2022

- Competed as a varsity athlete, balancing high academic achievement with athletic commitments, training, and top competition performance, leading to recruitment into college athletics
- Demonstrated teamwork and leadership by supporting and mentoring teammates during practices and competitions, contributing to a positive and motivating team culture

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## ADDITIONAL SKILLS

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- Skills and Language(s): Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development
- Clubs: TAMID, MoneyThink, Smart Women Securities, Alpha Phi Omega, Delta Gamma
- Interests: Sketching, Swimming, IM Volleyball

# Stella L. Johansson

Permanent address: 171 Cascade Ln, Aspen, CO 81611, USA  
Current address: Dartmouth College, 0023 Hinman, Hanover, NH 03755  
Phone: +12034519367/+393333234912  
Email: stella.l.johansson.27@dartmouth.edu

## PROFILE

Undergraduate student at Dartmouth College intending to major in Economics modified with Computer Science and minor in Japanese. US Ski Team Member (C-Team), World Cup Alpine Ski Racer. Member Dartmouth Ski Team. Hardworking, adaptable, and creative problem-solver. Excellent writer. Performs strongly in a team environment. Detail-oriented. Dual citizen, USA and Sweden. Lived in Europe for three years pursuing ski racing. Fluent in English, Swedish, conversational in Italian. Authorized to work in USA & EU.

## EXPERIENCE

*Dec 2024 to Present*

### **Protegrity Corporation**

*Remote Internship, Part-Time*

- Leading data security company with emerging focus on Generative AI Data Security
- Providing support for writing internal business plans, excel business plan model, budgeting, corporate strategy, conducting research in Generative AI Data Security

*2023 to Present*

### **US Ski & Snowboard Association**

*Member Alpine C-Team*

- Focused on World Cup and Europa Cup based in Europe
- Strong results, podium Europa Cup, 9 World Cup starts, World Junior Championships, US Ski Team
- Best female alpine athlete from Aspen, Colorado in nearly 50 years, 3<sup>rd</sup> best in all history

*2021 to 2024*

### **Team Johansson — Alta Badia and Dobbiaco, Italy**

*Athlete/Manager Private Alpine Ski Racing Team*

- Sole athlete in privately funded World Cup focused alpine ski racing team based in Sud Tirol, Italy, consisting of athlete, coach, ski technician, and shared dryland coach, with two vans, full team gear
- Managed and co-managed sponsor contracts, expenses and planning

## EDUCATION

*2024 to Present*

### **Dartmouth College — Hanover, NH**

*Sophomore, Class 2027, GPA 3.7*

- Intended major: Economics modified by Computer Science with minor in Japanese.

*2022*

### **Flatiron School — New York City**

*Software Engineering - Full Stack Developer*

- 45-week part-time coding program, suspended course due to ski racing, completed 20 of 45 weeks.

*2017 to 2021*

### **Aspen High School — Aspen, Colorado**

- GPA 4.1/4.4
- International Baccalaureate Program

## PERSONAL

- Collects Japanese figurines, enjoys backcountry skiing, hiking, fishing, running, singing, cooking/baking
- 25% Sami descendant, reindeer-herding indigenous Swedish people

# Tanner David Furtak

[Tannerfurtak@college.harvard.edu](mailto:Tannerfurtak@college.harvard.edu) | (619) 831-3300 | San Diego, CA

## Education

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**Harvard University** Cambridge, MA  
Bachelor of Arts, Concentration in Psychology with a Secondary in Economics | GPA 3.7 May 2027

- First Generation College Student
- Relevant Coursework: Intermediate Micro & Macro Economics, MIT Corporate Financial Accounting, Stats 1900
- Student Activities: Harvard Surf Club (Founder), Harvard Square Homeless Shelter, Boys and Girls Club of Boston, Harvard Half-Asian People's Association, Harvard Hoopsters Club Basketball, and Harvard Club Pickleball

## Relevant Experience

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**Make A Play** Remote  
*Finance Fellowship* Winter 2025

- Finance training program for student-athletes, offering case studies, professional coaching, and industry networking

**The Bird Rock Agency** La Jolla, CA  
*Consulting Intern* May 2024 - October 2024

- Reduced customer acquisition cost by 200% & increased sales volume by 100% for fintech clients
- Spearheaded AI research & market analysis, achieving sub-6 month payback on ad spend for core client products

**Harvard Investment Association** Cambridge, MA  
*Pitch Team Lead* November 2023 - Present

- Identify and analyze investment opportunities for a student-run portfolio with \$30K AUM
- Create pitch book presentations with company summary, industry drivers, investment theses, competition analysis, DCF and LBO models, and other valuations to present to an audience of 60+ members

**Harvard Financial Analysts Club** Cambridge, MA  
*Financial Analyst* September 2023 - Present

- Identify and analyze investment opportunities for a student-run portfolio with \$80K AUM
- Evaluate financial metrics such as capital efficiency, solvency, operational efficiency, liquidity, and growth potential, delivering key insights through polished presentation slides

## Additional Experience

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**Stealth Startup** San Diego, CA  
*Chief Operations Officer* September 2023 - Present

- Led meetings with industry experts to develop strategy, refine business models, and identify market opportunities

**All Pro Court Maintenance** San Diego, CA  
*Manager's Assistant* April 2019 - January 2024

- Grew yearly revenue and clientele by 40%, serviced 400+ tennis courts, and trained incoming employees

## Leadership and Activities

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**Harvard Division 1 Men's Water Polo** Cambridge, MA  
*Goalkeeper* August 2022 - Present

- Devoting 25+ hours per week, 2x NWPC defensive player of the week, team ranked top 10 in nation (2023)

**Harvard Surf Club** Cambridge, MA  
*Co-Founder, Board Member* February 2024 - Present

- Established the Harvard Surf Club with over 45 surf club members as the Ambassador of Stoke (Head of Marketing)

**Harvard Homeless Shelter** Cambridge, MA  
*Volunteer* January 2024 - Present

- Volunteer weekly with Harvard Square Homeless Shelter to hand out 300+ meals and supplies

**Boys and Girls Club of Boston** Cambridge, MA  
*Coach* October 2023 - Present

- Help teach 50+ low income kids the fundamentals of water polo and initiate a rec league for Boston

### **Additional**

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**Skills:** Excel, PowerPoint, R | **Language:** Spanish (Intermediate) | **Interests:** Value Style Investing, Surfing, Gym, Baseball

# TITUS J. EVANS

[LINKEDIN PROFILE](#) • (817) 606-7753 • [TE2333@COLUMBIA.EDU](mailto:TE2333@COLUMBIA.EDU)

## EDUCATION

**Columbia University** – New York, NY

**GPA: 3.2 /4.0**

B.A. in Economics-Philosophy

Anticipated Graduation: May 2027

- **Accomplishments:** NCAA D1 Student Athlete – Football, Presidential Honors, Captain of HS Varsity Football Team, Runner-Up State Bible Drill Speakers Tournament, Academic All-State
- **Relevant Courses:** Principles of Economics, Calculus I, Macroeconomics, Calculus III, Microeconomics
- **Wall Street Prep Education by 2025:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

## PROFESSIONAL EXPERIENCE

**Columbia Housing** – *Operations Assistant, Summer Intern* | New York, NY

**May 2024 – August 2024**

- Managed summer operations including building checks, room checks, inventory checks, and vendor delivery coordination
- Acted as primary escort and liaison to vendors working in the housing portfolio, ensuring smooth operations
- Assisted with guest Check-In and Check-Out event planning and execution, providing excellent customer service, and creating memorable guest experiences

**Kids Cove Community Outreach** – *Coordinator* | Dallas, TX

**June 2023 – August 2023**

- Managed the efficient distribution of 7+ coolers filled with meals across over 5+ sites daily within the Dallas Metroplex, ensuring timely delivery and satisfaction of recipients
- Maintained meticulous records of breakfast and lunch bag distribution and consumption weekly at each site, guaranteeing accurate tracking for inventory management and reporting purposes
- Systematically arranged and prepared over 40+ lunch and breakfast bags daily, ensuring timely and organized distribution to various locations, optimizing efficiency and service quality

**St. Matthew Missionary Baptist Church** – *Community Outreach and Health Safety Coordinator* | Dallas, TX

**March 2022 – August 2023**

- Organized community service and outreach events, such as a food distribution program, resulting in the successful placement of 35+ food trays for the homeless in the Dallas Metroplex, providing essential support to those in need
- Created and distributed over 25+ flyers monthly to effectively engage the community, increasing awareness and participation in the outreach program, thereby expanding its impact and reach
- Implemented and enforced rigorous health and safety protocols during food service events to maintain a germ-free environment, prioritizing public health and ensuring the well-being of participants and volunteers

## LEADERSHIP & COMMUNITY DEVELOPMENT

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

**March 2024 – Present**

- Selected to participate in an exclusive 2-part fellowship designed to prepare under-resourced college athletes for professional success at leading companies, receiving 20+ hours of interview preparation & participating in multiple case competitions with Fortune 50/100/500 companies.

**Selected Case Experience:**

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg Pincus's investment strategy (ongoing)**
  - Advising Warburg on the potential acquisition of an 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
  - Collaborating with a high-impact team of 5 pre-professionals to produce a comparable company analysis, DCF sense check & 5 financial assumptions to forecast key business drivers that will impact our financials
- **Delivered an investment thesis to Morgan Stanley's Fixed Income Team & Managing Director, Stephen Dance (closed)**
  - Achieved role of "scrum master," given to 15 top performers from MAP's fellowship of 1,250+ high achieving college athletes, leading a team of 5 first-year athletes tasked with delivering an investment thesis to MS's Fixed Income team + Managing Director
  - Crafted a recommendation using a 60/40 split between equity + fixed income for client's retirement portfolio with a total value of \$1M, managing 5+ work streams, including a PESTEL analysis

**Columbia University Varsity Football** – *Student-Athlete* | New York, NY

**August 2023 – Present**

- Effectively balancing the demands of being a Division I athlete with a full academic schedule, showcasing exceptional time management and prioritization skills to excel in both areas
- Demonstrating unwavering dedication by rigorously training for over 40 hours weekly in practice, conditioning, and competition, maintaining a high level of commitment while simultaneously managing a full academic course load

**Evercore** – *Freshman Discover Day Participant* | New York, NY

**July 2024 – July 2024**

- Participated in an interactive Investment Banking simulation hosted by AmplifyME, gaining hands-on experience in financial analysis, valuation, and strategic decision-making.
- Attended presentations and Q&A sessions with various managing directors, gaining insights into industry trends and Evercore's approach to investment banking

**Mansfield Timberview High School** – *Leader* | Mansfield, TX

**January 2020 – May 2023**

- Served as captain of the varsity football team for two years, earning the position through exemplary leadership and team spirit recognized by coaches and peers alike
- Led team meetings and voluntary practice sessions for 30+ members, enhancing cohesion, strategy execution, and a culture of continuous improvement

## NON-TECHNICAL SKILLS & INTERESTS

- **Skills and Language(s):** Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development

# TITUS HEIMULI

(714) 791-5935 • [TZH5@GEORGETOWN.EDU](mailto:TZH5@GEORGETOWN.EDU)

## EDUCATION

**Georgetown University; McDonough School of Business '27** | Washington, D.C.

**GPA: 3.6/4.0**

B.S. in Finance & Marketing; Minor in Entrepreneurship

Anticipated Graduation: May 2027

- **Accomplishments:** NCAA Division I Student-Athlete (Georgetown University Varsity Football Team)
- **Relevant Courses:** Financial Accounting, Marketing, Entrepreneurship, Business Statistics, Computational Business Model, Modeling Analytics, Economics
- **Industry Education:** Building a Financial Model, Core Data Analysis, Core Financial Concepts, Investing (Equity, Fixed-Income, Alternatives)

**Choate Rosemary Hall** – Wallingford, CT

**GPA: 3.9/4.0**

Post-Graduate High School Diploma

Graduated: May 2023

- **Accomplishments:** NEPSAC Student-Athlete (Choate Rosemary Hall Varsity Football Team); Second Team all NEPSAC; Honor Roll; National Honor Society
- **Relevant Courses:** Entrepreneurship, Foundations of Business, Statistics, Robotics, Topics of Engineering, Electronics, Coding

**Jserra Catholic High School** – San Juan Capistrano, CA

**GPA: 4.2/4.0**

High School Diploma

Graduated: May 2022

- **Accomplishments:** Four-Year Trinity League Student-Athlete (Jserra Varsity Football Team); Second Team all Trinity League; Four-Year Member of Prestigious Engineering Magnet Program; Dean's List; Principals List Honor Roll; National Honor Society; AP/Honor Student;
- **Relevant Courses:** AP Economics, Statistics, Engineering (Mechanical, Aerospace, Electronic, Civil), Coding, Mandarin Honors

## EXPERIENCE

**Warburg Pincus Investment Banking Case Competition – MAP Participant** | Remote

**December 2024 – Present**

**Selected Case Experience:**

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy**
  - Advising Warburg on the potential acquisition of an HVAC company, approving the design of a 3-Statement Model used to forecast the team's income statement, balance sheet & cash flow statement for up to 5 years.
  - Collaborating with a high-impact team of 5 pre-professionals to produce a comparable company analysis, DCF sense check & 5 financial assumptions to forecast key business drivers that will impact financials.
  - Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team.

**Exotic Vehicle Broker – Pacifica Exotics** | Newport Beach, CA

**March 2024 – Present**

- Working as an exotic/luxury vehicle broker, specifically sourcing and purchasing vehicles on behalf of Pacifica Exotics.
- Acquiring off-market client's vehicles, networking nationally to expand clientele and dealer network.

**Brand - Enhanced Hospitality – Lido House Hotel** | Newport Beach, CA

**March 2022 – September 2022**

- Worked as a Valet/Doorman at the luxurious Hotel *Lido House* under the Marriott Group, specializing in Parking and Hospitality.
- Helped with financials among team.

**Professional Aerial Photography – Titus Heimuli Media** | Dana Point, CA

**July 2015 – August 2022**

- Founded and ran an aerial photography business that utilized drones to take aerial photographs of commercial/residential real estate properties.
- Created listing brochures and marketing packets for real estate listings to promote sales.
- Worked with high-profile clients including CBRE, Lee & Associates, Mogharebi Group.

## LEADERSHIP & SPECIAL ACTIVITIES

**Georgetown University Varsity Football Team** – NCAA Division I Student-Athlete | Washington, DC

**July 2023 – 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.

**Operation Christmas Child** – Samaritan's Purse | Orange County, CA

**December 2018 – December 2022**

- Devoted time each Christmas Season at Samaritan's Purse Warehouse, packaging, wrapping, and shipping shoebox gifts for children in need, especially in underdeveloped communities nationally and globally.

## TECHNICAL SKILLS

- **Customer Relationship Management Training:** Developed ability to interact, be of service, and use quick thinking to solve problems.
- **Advance Excel & PowerPoint:** Proficient in utilizing Excel functions to analyze data and create reports, also effectively creating dynamic and visually captivating PowerPoint presentations.

## INTERESTS

- **Interests:** Wealth Management, Private Equity, Venture Capital, Real Estate Finance, FinTech, Polynesian/Pacific Islander's and minorities in Finance, Surfing, Cars, Snowboarding, Football, Basketball.

# TRISTAN A. WHITFIELD

[LINKEDIN.COM/IN/TRISTAN-WHITFIELD-424B59258](https://www.linkedin.com/in/tristan-whitfield-424b59258) • (262) 385-8506 • [T.WHITFIELD@PRINCETON.EDU](mailto:T.WHITFIELD@PRINCETON.EDU)

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## EDUCATION

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**Princeton University** – Princeton, NJ **GPA: 3.2/4.0**  
B.A. in Economics | Minor in Finance Graduation Year: Spring 2027

- **Accomplishments:** NCAA D1 Student-Athlete (Volleyball), EIVA Freshman of the Year (2024), Volleyball Recruiter All-American (2022, 2023), Convocation Opening Speaker (2023), Varsity Athletic Academic Award (2019, 2020)
- **Relevant Courses:** Macroeconomics, Statistics, Microeconomics, Plastic Sustainability
- **Wall Street Prep Education by 2025:** Accounting Crash Course, Investment Banking Interview Guide & Soft Skills

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## PROFESSIONAL EXPERIENCE

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**Hope Academy** – *Media Content Creation Intern* | Virginia Beach, VA **May 2024 – August 2024**

- Created, edited, and published content that captured the vibrant activities at Hope Academy and the spiritual engagement at Hope Lutheran Church.
- Enhanced knowledge on digital communication, which manifested in the development of a new website for the church.

**Tristan's Lawn Care** – *Founder, CEO* | Virginia Beach, VA **March 2020 – August 2023**

- Founded the company during the early stages of the global pandemic, training and contracting out several additional employees grossing over \$25,000 during operation.
- Developed specialized knowledge on how to scale a business, manage a team, and develop relationships with clients leading to annual raises from many clients.

**Hope Lutheran Church** – *Production Team Lead* | Virginia Beach, VA **March 2020 – June 2021**

- Led a multi-faceted team before, during, and after the global pandemic, producing weekly church services and other video content, effectively balancing the need to optimize team production with an unpaid volunteer-based workforce
- Identified and trained new, and oftentimes inexperienced, volunteers in the technical arts, balancing personalities to lead a multi-generational team.

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## LEADERSHIP & COMMUNITY DEVELOPMENT

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**Warburg Pincus Investment Banking Case Competition** – *MAP Participant* | Remote **December 2024 – Present**  
Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy**
  - Advising Warburg on the potential acquisition of an 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.
  - Collaborating with a high-impact team of 5 pre-professionals to produce a comparable company analysis, DCF sense check & 5 financial assumptions to forecast key business drivers that will impact our financials.
  - Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team.

**Princeton Volleyball** – *Team Captain* | Princeton, NJ **September 2023 – Present**

- Currently a recruited member of the Princeton Men's Volleyball team balancing a rigorous academic schedule with over twenty hours of weekly volleyball commitments.
- Named as a captain for the 2024-2025 season, the first sophomore to receive this distinction in recent program history.
- Day to day responsibilities include: being an intermediary between the coaching staff and players, uniting these two groups under the same goal and leading them in the direction to achieve that goal.

**USA Volleyball National Team** – *Team Member* | Colorado Springs, CO **March 2022 – Present**

- Participated on the u19 National Team for two years winning a gold medal and leading the United States to a first ever top four finish at the World Championships.
- Trained with the u21 national team during the summer of 2024, gaining valuable experience around competing at the highest level.

**Student Leadership Workforce Council** – *Consultant* | Virginia Beach, VA **February 2022 – March 2022**

- Recruited by City Government to consult with officials on how to attract more young people to live in their cost prohibitive municipality.
- Brainstormed and presented ideas to city government revolving around affordable housing, tax incentives, and increasing community services for young adults alongside a group of other high achieving students.

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## ADDITIONAL SKILLS

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- **Skills and Language(s):** English (Native fluency), Spanish (Basic conversational proficiency)
- **Programs:** Google Suite (Advanced), Microsoft Office (Intermediate), Adobe Creative Cloud (Proficient)
- **Interests:** Healthcare, Optimization, Operational efficiency, Investments, and Sustainability

# VLADIMIR DERBESHYAN

vderbeshyan@uchicago.edu | (818) 421-7246 | Los Angeles, CA

## EDUCATION

### The University of Chicago

Bachelor of Arts in Economics, Specialization in Business Economics (GPA: 3.82/4.0)

Chicago, IL

Expected: June 2027

- **Honors/Awards:** Odyssey "Full Tuition" Scholarship, First Phoenix Scholarship, Dean's Scholarship Award Recipient, Jeff Metcalf Internship Fellow, Global Honors, Midwest Conference All-Academic Team
- **Key Coursework:** Financial Accounting, Principles of Microeconomics, Principles of Macroeconomics, Statistical Methods and Applications, Elemental Functions and Calculus I, Elemental Functions and Calculus II

### El Camino Real Charter High School

High School Diploma – with High Honors (GPA:4.3/4.0)

Los Angeles, CA

Graduated: June 2023

- **Honors/Awards:** AP Scholar with Distinction (2023), Questbridge National Match Scholarship (2023), National Football Foundation Scholar-Athlete Award (2023), US Marine Corps Scholastic Excellence Award(2023)

## WORK EXPERIENCE

### Central Bank of Armenia (National Financial Institution) – Securities Market Summer Intern | Yerevan, Armenia

Summer 2024

- Created financial models to assess the potential growth of the crowdfunding sector following the legal framework established for SME financing, incorporating market trends, investor behavior, and capital allocation strategies
- Conducted research on the latest developments in the Armenian capital market, including tracking the impact of the Warsaw Stock Exchange's involvement and analyzing emerging investment opportunities and regulatory changes
- Created data reports analyzing the performance and liquidity of the foreign exchange and derivative markets

### Mgdesyan Law Firm (Criminal Defense and Trial Litigation Firm) – Summer Intern | Los Angeles, CA

Summer 2023

- Conducted legal research to support defense strategies for high-profile criminal cases, including murder, DUI, and Medicare fraud allegations, focusing on precedent analysis, evidence review, and procedural challenges
- Established communication with clients, ensuring they were informed about case progress and developments
- Created briefs and memos summarizing key legal precedents relevant to criminal defense cases handled by the firm
- Organized detailed case files and evidence for use in trial preparation, ensuring all materials were accessible, up-to-date, properly indexed, and cross-referenced for efficient retrieval during court proceedings

### El Proyecto del Barrio, Inc. Youth Source Center – Youth Employment Specialist | Los Angeles, CA February 2022 – September 2022

- Conducted outreach to connect out-of-school and jobless youth with employment opportunities tailored to the demands of the local labor market, including vocational training programs and apprenticeship placements
- Established partnerships with local businesses to develop job placement opportunities for youth participants
- Developed communication with schools and community organizations to identify youth in need of services

## LEADERSHIP & ACTIVITIES

### Warburg Pincus Investment Banking Case Competition – MAP Participant | Remote

December 2024 – Present

#### Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy**
  - Advising Warburg on the potential acquisition of an 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
  - Collaborating with a high-impact team of 5 pre-professionals to produce a comparable company analysis, DCF sense check & 5 financial assumptions to forecast key business drivers that will impact our financials
  - Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team

### University of Chicago Varsity Football – NCAA Student-Athlete (Offensive Lineman) | Chicago, IL

August 2023 – Present

- Offensive guard devoting 25+ hours per week to practice, film studies, competition, and strength training sessions
- Member of the Maroons of Character leadership development program offered by the Hyde Park Institute

### Scholars of Finance – Member | Chicago, IL

January 2024 – Present

- Cultivated skills in a recruitment boot camp focused on developing accounting, valuation, and modeling prowess
- Actively engaged in career preparatory workshops, executive speaking engagements, and a membership network

### Armenian Student Association – Treasurer | Chicago, IL

September 2023 – Present

- Created event budgets and secured funding to ensure that club activities, such as cultural celebrations, social gatherings, and community outreach programs, were fully financially covered and well-executed
- Conducted planning and coordination of club activities, ensuring smooth execution of social events, meetings, student opportunities, community outreach initiatives, and collaborative projects with other organizations

### Phi Gamma Delta Fraternity – Member | Chicago, IL

January 2024 – Present

- Organized and ran a successful social event in collaboration with Camp Kesem, in which 100% of the \$2000 proceeds from admissions were donated to the organization, supporting children affected by a parent's cancer
- Volunteered and assisted in the setup and running of the Bank of America Shamrock Shuffle and Chicago Marathon

## PERSONAL

**Skills:** MS Excel, MS PowerPoint, Research Skills, Presentation Skills, Fluency in Armenian, Strong Quantitative Skills, Foundational Accounting Knowledge, Data Management, R(programming language), Organization

# Ylan Nguyen

ylann@sas.upenn.edu | (512) 507-9216 | linkedin.com/in/ylan-tang-nguyen

## EDUCATION

### University of Pennsylvania, College of Arts and Sciences

Philadelphia, PA

Bachelor of Arts in Economics | Cumulative GPA: 4.0/4.0 | SAT: 1520/1600 (Math 790, EBRW 730)

Aug 2023 – May 2027

- **Relevant Coursework:** Microeconomics, Macroeconomics, Economics & Financing of Health Care Delivery, Health Care Systems, Operations Information and Decisions, Mathematics of Change
- **Accomplishments:** 2<sup>nd</sup> Place Wharton Asia Investments Stock Pitch Competition, Lake Travis High School Top 1% – Rank 3/874
- Wall Street Prep Education by 2025: Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

## EXPERIENCE

### Fulcrum Capital

Austin, TX

Distressed Credit Intern

May 2024 – Aug 2024

- Sourced 100+ investment opportunities using Bloomberg, S&P Capital IQ, LSEG, and Jus Mundi such as Brazilian Precatorios, bankruptcy and legal claims >\$50mm, distressed bank loans, litigation financing, and brokering opportunities
- Assisted in situation analysis modelling expected returns for range of bids offered to claimant of \$78mm against Visa-MC
- Worked with analysts, sourcing and sales team at a boutique investment firm specializing in private, illiquid distressed credit
- Learned about special situations topics from FTX and Citgo like bankruptcies, changes in capital structures, and claim trading

### MD Cress Ventures

Austin, TX

Private Equity Intern

Jun 2023 – Aug 2023

- Pitched pharmaceutical company developing pain management drug to investment committee for \$30mm early-stage financing
- Researched the opioid and multimodal analgesics markets through investor decks, published research papers, and UpToDate
- Crafted quarterly financial report summarizing business overview and highlighting changes in strategy and financial statistics
- Called Rainer Homecare physician offices to sign physical therapy, plan of care, and physician order forms for over 100 patients

## ACTIVITIES

### Penn NCAA Division 1 Track & Field

Philadelphia, PA

Athlete, Pole Vaulter

Aug 2017 – Present

- Dedicate 16+ hours a week towards practices year-round and travel to compete at track meets weekly as a Penn Varsity athlete
- Contributed to Penn Women's Track winning 2024 Indoor & Outdoor Ivy League Heptagonal Track & Field Championships
- Connect with Penn student-athlete community and engage in team-building exercises to develop teamwork and leadership skills
- Represented Lake Travis at the State 6A high school UIL competition for pole vault and placed 7th in Texas at State

### Wharton Investment & Trading Group

Philadelphia, PA

Analyst, Tactical Opportunities Group

Jan 2024 – Present

- Developed short pitch on EVgo Inc. (NASDAQ: EVGO) based on increasing competition, unprofitable units, and risky LOB
- Learn advanced finance topics such as bankruptcy and distress solutions, credit default swaps, and pricing put and call options
- Formulate restructuring solutions for case studies including three-statement models with capitalization tables for debt exchange
- Developed long pitch on (NYSE: BRBR) using alternative data to highlight drivers of differentiated growth in protein market

### Warburg Pincus Investment Banking Case Competition

New York, NY (Remote)

MAP Participant

Dec 2024 – Present

- Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy (ongoing)
- Advising Warburg on the potential acquisition of an 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
- Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team

### Make A Play Foundation (MAP)

Remote

Diamond League Fellow (Fall '24)

Sep 2024 – Nov 2024

- Participated in a 2-part fellowship for second-year college athletes from under-resourced backgrounds looking to prepare for success in the financial services industry, completing 3 modules on interview preparation and business communications
- Competed in 3 group mock interviews against 50+ other college athletes, receiving a 'very strong' rating in at least 2 of the interviews, advancing to Phase 2 of the fellowship ("the team competition") with Warburg's Human Capital Team

## ADDITIONAL INFORMATION

**Skills and Languages:** Native in English, Conversational Vietnamese, MS PowerPoint, MS Excel, Adobe Creative Suite

**Interests:** K-pop (IVE, Aespa, BTS), Cooking, Boba, Webcomics, Soccer, Coffee, Digital Art, Vegan Protein Bars

# ZERAUN E. DANIEL

[LINKEDIN.COM/IN/ZERAUN-DANIEL-33159028B/](https://www.linkedin.com/in/zeraun-daniel-33159028b/) • (347) 403-3995 • [ZED8@GEORGETOWN.EDU](mailto:zed8@georgetown.edu)

## EDUCATION

Georgetown University – Washington, D.C.  
Undecided Business Major | SAT: 1360

GPA: 3.5/4.0

Anticipated Graduation: May 2027

- Accomplishments: NCAA DI Athlete – Football, Patriot League Rookie of the Week, All-American High Jumper, 3<sup>rd</sup> Place at New Balance Indoor Nationals (High Jump)
- Relevant Courses: Principles of Marketing, Ethical Values of Business, Computational Business Modeling, Accounting
- Wall Street Prep Education by 2025: Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

## EXPERIENCE

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

January 2024 – Present

- Selected to participate in an exclusive 2-part fellowship designed to prepare under-resourced college athletes for professional success at leading companies, receiving 20+ hours of interview preparation & participating in multiple case competitions with Fortune 50/100/500 companies.

Selected Case Experience:

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg Pincus's investment strategy (ongoing)**
  - Advising Warburg on the potential acquisition of an 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.
  - Collaborating with a high-impact team of 5 pre-professionals to produce a comparable company analysis, DCF sense check & 5 financial assumptions to forecast key business drivers that will impact our financials.
  - Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team.
- **Delivered an investment thesis to Morgan Stanley's Fixed Income Team & Managing Director, Stephen Dance (closed)**
  - Achieved role of "scrum master," given to 15 top performers from MAP's fellowship of 1,250+ high achieving college athletes, leading a team of 5 first-year athletes tasked with delivering an investment thesis to MS's Fixed Income team + Managing Director.
  - Crafted a recommendation using a 60/40 split between equity + fixed income for client's retirement portfolio with a total value of \$1M, managing 5+ work streams, including a PESTEL analysis.
  - 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 high-impact team of 5 remain on task against a 5-week deadline for MS's Talent, Diversity & Inclusion team.
- **Co-created an agile transformation approach to introduce a more accessible housing system to Wells Fargo (closed)**
  - Collaborated with a team of 5 to deliver a transformation strategy to Wells' Talent Strategy team, specifically tasked with overseeing my team's risk-taking activities by designing control systems to ensure we regularly followed compliance procedures & monitored risk issues.
  - Created a color-coded risk assessment matrix to define the varying risk levels associated with launching our plan in 5 weeks, consolidating 10+ risks into a single chart to represent impact, the likelihood of occurring + mitigation strategies, ensuring 100% compliance with our plan.
  - Developed a change management strategy by applying the **ADKAR model** to outline 5 sequential goals ([A]wareness, [D]esire, [K]nowledge, [A]bility, [R]einforcement) required to implement our plan, providing the bank with clear milestones to help achieve our desired result(s).
  - Re-engineered the team's workflow process on Air Table by directing discussions for the monitoring phase to determine the scope of ~5 workstreams (i.e., risk assessment matrix, change management strategy), resulting in the team completing 50% of tasks ahead of schedule.

Flagstar – Flag Football Youth Organization | Washington, DC

March 2024 – May 2024

- Organized groups of eager children in football drills, building the fundamental steps to playing football with an increased understanding and increased football IQ under the teaching of other coaches and college players.

Rite-Aid – Cashier | Bronx, NY

September 2021 – October 2021

- Streamlined customer interactions by consolidating them onto various payment options and financial products, effectively communicating complex information in a clear and understandable manner, leading to a notable 20% increase in customer engagement.

## LEADERSHIP & COMMUNITY DEVELOPMENT

Georgetown University Varsity Football – NCAA Division I Student-Athlete | Washington, D.C.

August 2023 – Present

- Commit 25+ hours a week to practice, tournaments, film sessions, individual/team meetings, travel, 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.

Poly Prep Varsity Football – Student-Athlete | Brooklyn, NY

September 2021 – November 2022

- Spearheaded a quarterback/wide receiver summer throwing program as offensive captain, conducting 4 weekly sessions to enhance route timing and achieving a 28% increase in passing yards.
- Prioritized daily team film study as varsity captain, breaking down gameplay by position group for targeted individual development and heightened on-field awareness.

Boya Club of New York – Turkey Drive Volunteer | New York, NY

September 2019 – October 2019

- Managed annual turkey donations from local farms and grocers, overseeing the storage of over 500 turkeys in church freezers to supply holiday meals to low-income families.
- Advocated for year-round donation rounds-up at a supermarket chain, gathering 120 signatures from patrons and funding an extra 200 turkeys for the subsequent holiday drive.
- Organized Thanksgiving assembly lines with 30 volunteers to prepare boxes containing turkeys and fixings, distributing them to hundreds at community centers and in proximity to the Boys Club of NY.

## NON-TECHNICAL SKILLS & INTERESTS

- Interests: Music, Real Estate, Anime, Sports, Community

# Zezo Beshir

[LINKEDIN.COM/IN/ZEZO-BESHIR-0817BA310/](https://www.linkedin.com/in/zezo-beshir-0817ba310/) • (832) 208-5575 • [ZBESHIR@SAS.UPENN.EDU](mailto:zbeshir@sas.upenn.edu)

## EDUCATION

**University of Pennsylvania, College of Arts & Sciences**, Philadelphia, PA **GPA: 3.75/4.0**  
Candidate for Bachelor of Arts in Philosophy, Politics, and Economics Anticipated Graduation: May 2027

- **Accomplishments:** NCAA Division I Student-Athlete (Track & Field)
- **Relevant Courses:** Introduction to Microeconomics; Calculus 2; Introduction to Statistics; Experimental Psychology
- **Wall Street Prep Education by 2025:** Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

## PROFESSIONAL EXPERIENCE

**Raymond James – Incoming Business Development Analyst (Tech Services)** | Boston, MA **June 2025 – August 2025**  
**Harvard J. Paulson School of Engineering – Research Assistant** | Boston, MA **June 2024 – August 2024**

- Produced literature reviews on lab publications by reading 50+ articles on PubMed and identified gap in lab's cardiovascular stem-cell research, resulting in me comparing structural and maturational phenotypes of different differentiation methods of cardiomyocytes
- Validated purchase of bioreactor by proving it produces 100-150 million heart cells per batch with 89% purity (compared to 51% purity of handmade) and cells with increased maturity, through bioreactor testing
- Developed and delivered a PowerPoint presentation detailing experiment procedure, design, and hypothesis testing, successfully validating the purchase of a bioreactor; selected to present to the Dean of Harvard Medical School & coordinate an open house where I helped raise funds

**Boston Children/Dana-Farber Cancer Institute – Intern** | Boston MA **June 2022 – August 2023**

- Compiled scatterplots, using MatLab to filter target cells, expediting lab procedure
- Partnered with lab teams to troubleshoot and maintain essential equipment, including microscopes, flow-cytometry machines, and

**Student Landscaping – Labor Coordinator** | Newton, MA **June 2022 – August 2023**

- Founded landscaping business with 2 peers, which expanded to a six-figure business allowing us to perform 60+ landscaping projects for elders in our neighboring communities free of charge
- Trained 10 employees on basic masonry, power washing, window washing, and landscaping, increasing workforce from 15 to 25 employees
- Oversaw quoting of jobs, payments and bonuses to 25 employees, and coordinating routes for each team of landscapers to ensure equipment was used and delivered between different projects

**Newton Community Farms – On-Field Intern** | Newton, MA **September 2022 – May 2023**

- Conducted visits and interviews at 20+ commercial stores, small businesses, and community farms to assess EBT food stamp acceptance, documenting customer-facing signage related to benefit usage, resulting in installation of EBT at farmers markets
- Reported findings on government policies surrounding benefits by thoroughly researching government websites at bi-weekly synopsis to the board of Newton Community Farm
- Interviewed 10+ individuals experiencing food insecurity, gathering personal insights into consumer experiences, and advised graphic designer on additional information needed for the brochure

## LEADERSHIP & COMMUNITY DEVELOPMENT

**Warburg Pincus Investment Banking Case Competition – MAP Participant** | New York, NY (Remote) **December 2024 – Present**  
**Selected Case Experience:**

- **Executing a comprehensive valuation analysis of a new HVAC company to fit within Warburg's investment strategy (ongoing)**
  - Advising Warburg on the potential acquisition of an 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
  - Submitting a final pitchbook + single master document (CIM) outlining the materials produced by the project, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team

**University of Pennsylvania – Varsity Track and Field Athlete** | Philadelphia, PA **August 2023 – Present**

- Facilitated a team-wide initiative fostering open dialogue on leadership, communication, and team dynamics, resulting in the implementation of weekly track study halls, group-led activities, and Sunday recovery days

**Penn Wharton Leadership Academy – Trainee** | Philadelphia, PA **August 2023 – Present**

- Engaged in a specialized curriculum focused on leadership styles, character development, personal values, and effective communication, delivered by experts as part of Penn Athletic Wharton Leadership Academy

**Newton South High School – Captain of Track and Field and Football** | Newton, MA **August 2019 – August 2023**

- Led 3 varsity teams, fostering collaboration and a shared commitment to excellence; orchestrated fundraising efforts, helping raise \$12,000+ for new stadium lighting and turf installation, significantly enhancing athletic facilities

**Courageous Conversations on Race – Cohort Leader** | Newton, MA **August 2019 – August 2023**

- Collaborated with peers to facilitate presentations, incorporating interactive activities, video analysis, and historical context of racism to all sophomore chemistry classes, resulting in presentations to 400+ students
- Addressed high-profile racist incident involving a football coach leading to stronger team culture + undefeated record following his termination

## TECHNICAL SKILLS & INTERESTS

*Technical:* Microsoft Office Suite (Excel, Word, PowerPoint), Confocal Microscopy, Human Cell Culture,  
*Interests:* Wall Street Journal, Golf, Tennis, Cooking, Reading