

Addison C. Bray

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EDUCATION

Yale University, New Haven, CT August 2023 - May 2027
Student-athlete (Women's Soccer) pursuing a B.A. in Economics with a certificate in Data Science

Westlake High School, Austin, TX August 2019 - May 2023
Awards: United States Gold Presidential Service Award, P.E.O. STAR Scholarship, Girls Academy League Board Member, 200+ hours of community service, 60+ hospital clinical hours, soccer team captain/highly decorated, Miss Westlake Runner-up, National Charity League Board Member

WORK EXPERIENCE

Slayden Grubert Beard PLLC, *Intern*, Austin, TX June 2024 - August 2024

- Hands-on experience in intellectual property law: tasked with projects and presentations with a concentration on patents and the processes of M&As
- 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

Yale Admissions Office, *Student Ambassador*, New Haven, CT October 2024 - Present

- Yale representative at Austin area high schools: presenting educational opportunities and financial aid options to prospective students
- Presented to over 100 students about financial aid breakdowns and paths
- Hands-on experience curating PowerPoint presentations and developing soft-skills

LEADERSHIP EXPERIENCE

Athletes in Action, *Leader*, New Haven, CT August 2024 - Present

- Create a curriculum of lessons and organize meetings to lead peers in study, perform administrative tasks, and plan events to cultivate community engagement

Yale Bulldogs for Change, *Representative*, New Haven, CT August 2024 - Present

- Work with other student-athlete affinity groups to increase engagement with the student body and develop presentations and plans for the end-of-semester banquet

Yale Women's Athletic Council, *Member*, New Haven, CT September 2023 - Present

- Participate in civic engagement with my peers participating in career progression initiatives

SKILLS

Computer Skills: Java, R, Excel, PowerPoint, Microsoft Office

Language Skills: Italian (intermediate), Spanish (conversational)

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

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EDUCATION

Harvard University

Bachelor of Arts | Applied Mathematics

GPA: 3.64/4.00

Cambridge, MA

May 2027

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

Latin School of Chicago

High School Diploma | Cum Laude Society

GPA: 4.16/4.00

Chicago, IL

June 2023

- Elected Co-Curricular Prefect Junior and Senior years: one of 5 elected student government positions for all high school activities
- 4x all-state athlete - 2nd in discus and 4th 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

EXPERIENCE

Sycamore Partners

Incoming Summer Analyst

New York, NY

June 2025 – August 2025

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

Grand Teton National Park (GTNPF)

Research Intern

Jackson Hole, WY

July 2024 – August 2024

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

Latin HS Improvisation Course

Teacher Assistant

Chicago, IL

August 2022 – December 2022

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

ACTIVITIES

Harvard Track & Field

Varsity Team Member (Recruited Athlete)

Cambridge, MA

September 2023 – Present

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

Smart Women Securities

Investment Team Associate

Cambridge, MA

February 2024 – Present

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

Harvard Financial Analyst Club

Member

Cambridge, MA

December 2023 – Present

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

Latin Student Investment Fund

Board Member (President 2022-2023)

Chicago, IL

September 2021- June 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

Wolf Judo Club

Member

Chicago, IL

September 2012-2021

- 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

ADDITIONAL

Language: Native in English and Conversational in Spanish

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

Amy Mao

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EDUCATION

Brown University, *B.Sc. Applied Mathematics-Biology & B.A. Economics*, Providence, RI | **Expected Graduation May 2027**
3.9/4.0 GPA **SAT: 1550**

Relevant Courses: Statistical Inference I, Applied Ordinary Differential Equations, Multivariable Calculus, Intermediate Microeconomics, Intermediate Macroeconomics, Financial Accounting, Finance and the Environment, Intro to Computer Science

Montgomery High School, 4.0/4.0 GPA, 4.32/4.00 Weighted GPA, Cum Laude Skillman, NJ | Class of 2023

PROFESSIONAL EXPERIENCE

Tigbourne Capital, *Private Equity Intern, ESG Head* St. Louis, MO | May 2024 – October 2024

- Designed and executed ESG strategies, primarily focusing on sustainability and environmental benefits, creating ESG sustainability-oriented decks with financial models used by various teams and in multiple meetings with potential partners
- Managed a team of five interns, delegating tasks such as outreach, deck building, and compiling materials needed before key meetings with potential partners and clients; ensured timely completion of research and investment analyses within the team
- Coordinated outreach with more than 100 stakeholders and secured 20+ meetings with potential partners and clients
- Led due diligence projects for major meetings with key Directors, VPs, and Board Members of major oil companies

Atlantic Health System, *Ambulatory Analyst Intern* Morristown, NJ | June 2024 – August 2024

- Spearheaded the implementation of a digital consent system across 4 offices, streamlining workflows and reducing administrative expenses by a projected \$500,000 annually, significantly enhancing operational efficiency
- Collaborated with the Integration Technology Team to optimize lab reporting systems by reducing processing errors by 95%, directly improving workflows for 200+ providers and patients across the health system
- Conducted rigorous testing and validation of system workflows, identifying inefficiencies and worked closely with senior members on team to provide actionable recommendations to save costs and enhance system performance
- Cleaned and consolidated over 75% of duplicate patient records in Pure OHS, the electronic medical record system, to improve data quality and reduce redundancies; significantly organized Pure OHS, facilitating provider workflows

Brown Socially Responsible Investment Fund, *Education Chair, Financial Analyst* Providence, RI | Dec 2023 – Present

- Pitched and researched stocks of healthcare companies (J&J, AstraZeneca, etc.) weekly, focusing on finance and ESG factors
- Contributed heavily to the pitching and adding four new stocks to our portfolio which has overall, had a positive net return
- Created ESG specific educational slides monthly, educating members on current ESG related financial news and concepts
- Analyzed financial statements and created financial reports on assigned healthcare companies using Excel
- Led discussions and voting on stocks through our student-led investment fund with over \$250k in assets under management

Warburg Pincus Investment Banking Case Competition, *MAP Participant* Remote | Dec 2024 – Current

- Collaborating with small deal team of peers to advise Warburg Pincus on the potential acquisition of a new HVAC company
- Leading 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
- Performing a comparable company analysis against 3 similarly situated HVAC companies by evaluating ~5 key metrics (i.e., size) 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

LEADERSHIP & ENGAGEMENT EXPERIENCE

Brown Varsity Fencing, *NCAA Division I Athlete, Community Captain/Social Chair* Providence, RI | August 2023 – Present

- Led epee squad during practice, footwork drills, and bout drills for 20+ hours per week
- Implemented epee squad meetings with all 6 squad mates to review bouts and discuss strategy once a week for an hour
- Organized team volunteering events biweekly and represented Brown Athletics in multiple community service initiatives
- Ranked Top 10 nationally, won Bronze in the 2023 Summer Nationals and in 2022 December National American Cup.

Women in Business, *Associate Member, WIB Academy Member* Providence, RI | September 2023 – Present

- Coordinated group discussions in selective WIB Academy Program and planned outreach activities with alumni and mentors
- Volunteered at local charities, local food drives, local businesses representing the club

Make A Play Foundation (MAP), *Diamond League Fellow* New York City, NY | October 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 and Wall Street Prep instruction in the process
- Participating in case competition with Warburg Pincus, introducing a new HVAC company including a 3-statement model

SKILLS & INTERESTS

Technical Skills: Proficient in Microsoft Office Excel, PowerPoint, Google Apps, Cash handling, Java

Language: Bilingual proficiency in English and Mandarin, attained NJ Seal of Biliteracy in French

Interests: Fencing, sunbathing, cello, decorating/organizing rooms, Brown Cheese Club

ANNE YANG

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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 Bilinguality

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

Ashley Wang

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EDUCATION

Columbia University, Columbia College

Bachelor of Arts in Financial Economics

- 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

New York, NY

Expected May 2027

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, building a foundation finance skillset.
- Will complete coursework and case studies that include accounting, valuation, modeling, Bloomberg Terminal, and asset allocation, mastering financial fundamentals.

Make-A-Play Foundation x Bank of America Winter Fellowship

Analyst

Remote

January 2025 – March 2025

- 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 final management presentation to BofA's Talent Acquisition team.
- Co-designing a 3-statement model to forecast the healthcare company's income statement, balance sheet, and cash flow statement for up to 5 years, simultaneously researching key healthcare data market trends to clearly articulate the company's positioning + strategy.
- 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

VAE, Inc.

Accounting Intern

Springfield, VA

May 2024 – August 2024

- Spearheaded 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, increasing accuracy by 30%
- Assisted in month-end close process, reconciling balance sheet accounts and completing journal entries to resolve 10 discrepancies found by seniors

LEADERSHIP & ACTIVITIES

Barnard Investment Group

Analyst/Secretary

New York, NY

October 2024 – Present

- Spearheaded project 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, providing members an opportunity to learn and stay updated on finance news
- Completed training modules for active members, covering topics including accounting, valuation, modeling, and equity research, gaining a foundation of finance knowledge
- 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 2-3 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, providing pre-professional events to general body members

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

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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

AYUSH SARAN

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EDUCATION

Dartmouth College – Hanover, NH

GPA: 3.3/4.0

B.A. in Economics | Minor in Legal Studies | SAT: 1550

Anticipated Graduation: May 2027

- Accomplishments: NCAA Division 1 Athlete (Dartmouth Varsity Cross Country and Track); 2022 Trenton Times Runner of the Year; 2x All-State Cross Country Team Selection; NJSIAA Sectional Champion; AP Scholar with Distinction
- Relevant Courses: Econ. of Financial Intermediaries & Markets, Calculus of 1 + Several Variables, Calculus of Vector-Valued Functions
- 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* | New York, NY (Remote)

February 2024 – March 2024

- Collaborated with a team of 5 to deliver a 3-year transformation strategy to Wells’ Talent Strategy team, specifically tasked with managing my team’s finances to expand the wealth-building capacity of property ownership and affordable rental housing in URM communities
- Created a value proposition budget to guide Wells on how it should deploy its budget across three stages (20% in Stage 1 | 33% in Stage 2 | 47% in Stage 3), implementing a S.M.A.R.T. framework to ensure expenses were specific, measurable, achievable, relevant, and timely
- Developed a KPI framework that organized our business objectives, goals & key performance indicators into a single slide, systematically articulating my team’s shared vision & providing the bank with a centralized framework to track our progress/take improvement action(s)
- Re-engineered the team’s workflow process on Air Table by directing discussions for the control phase to determine the scope of ~5 workstreams (i.e., 3-part budget, benchmarking analysis, KPI framework), resulting in the team completing 50% of tasks ahead of schedule

Plainsboro Peer Tutoring – *Peer Tutor* | Plainsboro, NJ

September 2019 – December 2019

- Taught 10 middle schoolers on geometry, algebra, and taught new, advanced topics to increase interest in math, which resulted in 10% average increase in their math test scores
- Coordinated with other tutors to eliminate overlap between teaching sessions, ensuring an efficient and comprehensive curriculum
- Assessed the performance of students biweekly to revise concepts, resulting in an increased understanding of the previous concepts covered

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
- Collaborated 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

Dartmouth Cross Country and Track Team – NCAA Division I Student-Athlete | Hanover, NH

August 2023 – Present

- Train year-round with 70+ miles and two strength & conditioning sessions per week as well as compete in meets every 2-3 weeks while maintaining a rigorous academic course load
- Prioritize short-term and long-term goal setting to maximize academic and athletic performance, demonstrating effective time management
- Managed the men’s cross country team Instagram account to cultivate a stronger team culture and improve follower engagement with the team and our race performances

Youth Orchestra of Central Jersey – Section Leader | Plainsboro, NJ

September 2021 – May 2023

- Conferred with the conductor as well as the violin, cello, and bass section leaders in creating bowings for the rest of the orchestra, resulting in increased coordination among members of the orchestra
- Performed in concert with David Kim, the concertmaster of the Philadelphia Orchestra, after 3 months of practicing with him and the rest of the orchestra on a difficult orchestral piece
- Selected as 1 of 3 violists out of the top 35 orchestra members to perform in concert with Midori, a professional violinist

High School South Cross Country and Track & Field – Captain | Plainsboro, NJ

September 2021 – May 2023

- Coordinated with the athletic coaching team to pick 3-4 in-season races to maximize team performance throughout the season
- Constructed seasonal team goals after meeting with all team members, which resulted in a very consistent attendance from all team members now that a clear framework for the season was provided
- Managed the team’s social media with weekly posts about training updates and upcoming races, resulting in a more tight-knit community within the team and more awareness within the school about the performance of the cross country and track teams

Trenton Area Soup Kitchen – Volunteer | Trenton, NJ

June 2022 – September 2022

- Stored/prepared/provided 750+ trays of food to HomeFront, an organization that provides housing programs for homeless/military families
- Cooperated with other volunteers from 12pm to 3pm every weekday to provide food to all individuals in the soup kitchen, resulting in over 200 people fed per day during peak lunch hours
- Delegated tasks to other volunteers in the soup kitchen, which led to an increase in efficiency with serving food and preparing food trays

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Running, playing the viola, solving Rubik’s cubes, and Bollywood.

Maeve Sarchet Baker

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EDUCATION

Stanford University **Stanford, CA**
Management Sciences & Engineering, Bachelor of Science *Sep 2023 - Jun 2027*

- GPA: 3.983/4.000
- Relevant Coursework: Foundations of Corporate Finance, Accounting for Managers and Entrepreneurs, Economic Analysis, Principles of Economics, Linear Algebra and Differentiable Calculus, Programming Methodology, Introduction to Probability

Tuck School of Business at Dartmouth University **Hanover, NH**
Bridge Program Student *Jun - Jul 2024*

- Participated in a highly selective program taught by MBA faculty, applying concepts in business strategy, microeconomics, accounting and finance to real-world business case studies
- Collaborated with 4 peers and performed team-based valuation analyses of Shake Shack, which included financial and strategic assessments, a DCF analysis, and a final presentation to industry executives and faculty

Deerfield Academy **Deerfield, MA**
Aug 2019 - May 2023

- High Honor Roll, Captain of Varsity Squash Team, President of Entrepreneurship Club
- Relevant Coursework: AP Calculus AB (5/5); Introduction to Multivariable Calculus, AP Computer Science (5/5)

INTERNATIONAL AND COLLEGIATE ATHLETICS

Stanford Varsity Squash - Division 1 **Stanford, CA**
Student-Athlete *Sep 2023 - Present*

- Balanced 25-30 hours of athletic commitments each week (practice, film study, weight training, etc.) with a full course load
- Competed from October to March, traveling cross-country for 6+ Division 1 intercollegiate matches each season
- Finished freshman season with a 10/4 record playing 5th on the ladder, vital in contributing to the team's 5th-place finish in the College Squash Association rankings

Team USA - US Junior National Team **US, UK, Argentina**
Junior National Team Member *2014 - 2023*

- Represented the U.S. at the 2023 British Junior Open and 2023 Pan American Junior Championship as a member of the Junior National Team
- Won Gold Medal for Team USA at 2023 Pan American Junior Championships in Buenos Aires
- Voted All American Player by the New England Independent School Association and U.S. Squash for 2022-2023 Season

LEADERSHIP AND PROFESSIONAL EXPERIENCE

Make-A-Play Foundation - Women Playmakers Cohort **Stanford, CA**
Winter Fellow *Jan 2025 - Present*

- Participating in intensive interview preparation, including three Fortune 500-style mock interviews and structured assignments to enhance communication and problem-solving skills
- Collaborating with UBS on a case competition addressing real-world business challenges, focusing on strategic analysis, project management, and professional presentation delivery

Stanford Finance **Stanford, CA**
Financial Analyst *Nov 2024 - Present*

- Selected as 1 of 25 students from over 125+ prospective applicants to join the highly competitive Stanford Finance analyst program
- Completed workshop series covering key financial concepts, including Accounting, Valuation Methods, DCF analysis, and LBO modeling

Stanford Women in Finance **Stanford, CA**
Active Member *Sep 2024 - Present*

- Participated in weekly meetings on educational workshops, professional development events, and networking opportunities

Student Athlete Mentorship Program **Stanford, CA**
Mentor *Sep 2024 - Present*

- Guided a new student-athlete in balancing academics and athletics, offering strategies for time management and training optimization

Kappa Kappa Gamma **Stanford, CA**
Vice President of External Affairs *Sep 2024 - Present*

- Directed community engagement initiatives for 150+ active members, focusing on impactful community service projects
- Acted as the public-facing liaison, building relationships and facilitating effective communication with alumni and administrators

Baker Residential **New Canaan, CT**
Intern *Jun - Aug 2024*

- Developed and presented a Competitive Market Analysis for a 425-unit residential project, leveraging linear regression to identify market trends and recommend strategic pricing decisions
- Streamlined administrative processes, including organizing records, managing files, overseeing mailings, and utilizing databases

SKILLS & INTERESTS

Technical: Microsoft Office, Word, PowerPoint, Excel, Outlook, Python, Java

Certificates & Training: Bloomberg Market Concepts, Bloomberg Finance Fundamentals, Wall Street Prep: Finance Certificate

Interests: Racquet Sports, Cooking, Backroads Trips, Reading Biographies, Skiing

BEZA MILLER

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EDUCATION

Washington University in St. Louis, College of Arts & Sciences | St. Louis, MO

May 2027

Bachelor of Arts - Economics | non-BSBA second major: Finance

- **GPA:** 3.72/4.00

London School of Economics and Political Science | London, England

June 2024 – July 2024

Course: Financial Markets and the Global Economy: The History of Bubbles, Crashes, and Inflation

- Studied both American and international markets in central London while getting an opportunity to travel and experience different cultures

RELEVANT 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 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, completing ~20% of the project by performing a comparable company analysis + building my team's income statement
 - Leading 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 + check the reasonableness of our assumptions
 - Performing a comparable company analysis against 3 similarly situated HVAC companies (i.e., Limbach Holdings, Inc., Comfort Systems USA, Inc., Modine Manufacturing Company), evaluating ~5 key metrics (i.e., business model, data availability, growth rate geography, size, product or service) 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

The Hoops Closet – *Apparel Resell Business* | Jacksonville, FL

July 2023 – Present

- Partnered with Division I student-athletes, managing end-to-end operations across sourcing, sales, and profit distribution.
- Managed inventory tracking and control to ensure a steady supply of resale apparel for the business
- Led inventory management and social media marketing strategy, driving visibility and sales growth while ensuring consistent product availability.
- Negotiated purchasing and pricing terms with sellers and buyers, optimizing profitability and enhancing business efficiency.

LEADERSHIP & COMMUNITY DEVELOPMENT

Washington University Varsity Men's Basketball Team – *Point Guard* | St. Louis, MO

August 2023 – Present

- Organize and market to basketball team about student-athlete related community service projects, panels, workshops, and athletic events
- Assisted in 10+ recruiting visits and met with prospective WashU student-athletes
- Counseled 5 first-year teammates on effective time management and task prioritization strategies to support their transitions

Washington University Investment Banking Association (WUIB) – *Active Member* | St. Louis, MO

October 2024 – Present

- Attend weekly meetings focused on developing skills pertinent to investment banking recruiting and internship processes
- Gain insight on the investment banking industry, including analyst roles, deal dynamics, and overarching market strategies
- Participate in mock networking calls and interviews with mentors who recently completed the recruitment process

Student Athlete Advisory Committee (SAAC) – *Member of the Career Division/ Ambassador for Basketball Team* | St. Louis, MO

October 2023 – Present

- A student-athlete run organization of 70 general body members & 16 exec members aimed to elevate 550+ student athletes' journey
- Serve as an ambassador, facilitating communication between the basketball team and the committee, and advocating for teammates' ideas
- Collaborate directly with Career Center and Athletic Department officials on planning student athlete career, D&I, and service initiatives
- Coordinate events to help prepare student athletes for internships, connect them to employers, and teach them how to market themselves as student-athletes to recruiters

Washington University Black Letter winning Athlete Coalition (WU BLAC) – *General Body Member* | St. Louis, MO

August 2024 – Present

- Organization focused on empowering Black student-athletes through advocacy and community-building
- Collaborated with university leadership to enhance diversity, equity, and inclusion within the athletic department and diversify athletic staff
- Supported initiatives to include Black student-athletes in decision-making processes and create spaces for personal and professional development
- Worked on developing partnerships with WashU and the greater community to improve the Black student-athlete experience.

Youth Basketball Trainer/ Coach – *Guard skills/ Shooting/ Public Speaker* | Jacksonville, FL

June 2019 – Present

- Helped run camps of 90+ young athletes ranging from grades 1-9
- Delivered speeches at to youth on hard work, sacrifice, and good character while fostering competitive environments for skill development.
- Provided in-home basketball training sessions for youth, traveling to clients' residences across the city

Miscellaneous/ Extra Community Development:

August 2020 – May 2023

- Smile at ESJ Club, Habitat for Humanity volunteer, NHS tutor, All Things New Club

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Basketball, Travel, Surfing, Skateboarding, Weightlifting, Fitness, Movies, Music, International Flag Collecting

BRIANNA J. LEE

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EDUCATION

Cornell University – Ithaca, NY

GPA: 3.75/4.0

B.A. in Hotel Administration | Minor in Real Estate | ACT/SAT: 34/1410

Anticipated Graduation: 2027

- Accomplishments: NCAA Division I Athlete (Cornell Varsity Fencing); USA Fencing All American First Team; July Challenge Nationals GOLD (Fencing); Columbia Business School Model Entrepreneur Competition Finalist; Media Arts Program Leadership Design Director
- Relevant Courses: Financial Accounting, Business Computing (Excel, Word), Business Writing, Microeconomics, Organizational Behavior and Leadership
- Industry Education by Spring 2024: 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

PROFESSIONAL EXPERIENCE

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

January 2024

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

Silicon Valley Fencing Center – *Front Desk* | Sunnyvale, CA

01/2023 – 07/2023

- Administered daily operations by processing over 100 customer invoices daily, managing enrollment paperwork weekly, and efficiently overseeing the payroll of over 400 students, leveraging advanced skills of Intuit QuickBooks
- Formulated and executed engaging weekly two-hour lesson plans for a diverse group of 20 students, and developing the techniques of young and rising fencing enthusiasts, contributing to their overall athletic and personal growth
- Enhanced ability to set goals, analyze them, create a detailed outline of how to successfully achieve the goal, then execute upon the plan

Sul & Bean – *Sales Associate* | Cupertino, CA

01/2023 – 07/2023

- Supervised and efficiently processed a high volume of over 150 daily orders, demonstrating strong organizational and multitasking skills, while resolving customer complaints professionally with a focus on ensuring customer satisfaction
- Trained and onboarded over 10 employees across two franchise locations, ensuring a seamless integration into the company's workflow while demonstrating mentoring skills, and fostering a positive work environment
- Modified and costed recipes as well as was back of house

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 designed to prepare first-year minority athletes for professional success
- Receive 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
- Collaborate with a 6-person scrum team to develop a multi-year strategy for Deloitte's 2024 Olympic agenda against a 5-week deadline
 - Technical Skills Acquired: [Agile Project Management](#) | [Scrum Methodology](#) | [Tuckman's 5 Stages of Group Development](#)

Cornell Fencing Team – NCAA Division I Student-Athlete | Ithaca, NY

05/2023 – Present

- Manage 20 hours per week to training, technical analysis, and competitions while maintaining a full course load
- Assigned and formulated weekly goals and strategic plans for a team of 27 athletes to prepare for the NCAA
- Enhance goal-setting proficiency by establishing annual objectives and implementing a daily task framework, resulting in a double increase in productivity

Poshmark – Second Hand Retailer | Remote

12/2019 – Present

- Respond diligently to an average of 20 customer complaints daily, and earned 150 five-star reviews, reflecting a commitment to delivering exceptional service and gaining adaptability in a dynamic customer support environment

Media Arts Program Leadership – Marketing Director | Saratoga, CA

08/2023 – 07/2023

- Conducted and managed a comprehensive set of over 30 market surveys, gauging program value and gathering valuable insights for strategic decision-making, and exhibiting leadership by supervising a team of three peers
- Exhibited proficiency in graphic design and Adobe Illustrator, and created two posters and presentations weekly, advertising social events, Pielooza, and Shark Tank initiatives, and contributed to boosted student engagement
- Coordinated marketing and planning of social events by sending out graphics and flyers for multiple events to increase participation

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Fencing, drawing, dancing, violin, reading
- Biggest Sports Lesson: Each loss serves as a valuable reminder that there are areas for improvement, and giving one's best effort transforms the experience of defeat, making it more rewarding than a loss.

CHRISTA C. KAY

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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

Bryn Mawr, PA

GPA: 4.0; ACT: 36

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

DELFINA GONZALEZ LOBO

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EDUCATION

Columbia University – New York, New York

GPA: 3.8/4.0

B.A. in Financial Economics, Minor in Entrepreneurship and Innovation

Anticipated Graduation: May 2027

- Accomplishments: Division I Student-Athlete (Women's Field Hockey); NFHCA Academic Squad; All-NEPSAC First Team (2022&2023); FAA First Team; Northeast All-Region First Team
- Relevant Courses: Principles of Economics, Calculus I, Calculus III, Intermediate Macroeconomics, Intermediate Microeconomics, Calc-based Statistics, Accounting & Finance
- Wall Street Prep Education by 2025: Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

EXPERIENCE

Iceberg Solutions – *Finance & HR Intern* | Buenos Aires, Argentina

June 2024 – August 2024

- Participated in a 4-week internship in a software company based in Argentina providing services to US corporate customers

Morgan Stanley Fixed Income Case Competition – *MAP Participant* | New York, NY (Remote)

March 2024 – June 2024

- Collaborated 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 worth \$1M in value, managing 5+ workstreams including a risk analysis matrix
- Named finalist, being one of the three groups to **present our recommendation** in the NYC Morgan Stanley headquarters

AGH Field Hockey – *Coach* | Greenwich, CT

June 2022 – September 2024

- Coached and mentor girls in field hockey, guiding them through over 20 dynamic practices per season; cultivating an empowering environment, resulting in high rates of player retention and continuous improvement among participants
- Appointed Coach of the Clinics Program, where I meticulously structured practices and competitions for a cohort of 60 girls; through strategic planning and attentive coaching, the program received numerous positive reviews under my leadership

Gofer's Ice Cream – *Server/Cashier* | Greenwich, CT

May 2021 – September 2021

- Communicated effectively with customers, ensuring a positive experience and fostering loyalty
- Implemented strategies that doubled our daily customer traffic, significantly enhancing productivity and sales
- Actively listened to customer needs and preferences, providing attentive service, addressing inquiries with professionalism and enthusiasm

LEADERSHIP & COMMUNITY DEVELOPMENT

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 (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: 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 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

Coffee For Good Executive Board – Vice President | Greenwich, CT

September 2019 – June 2023

- Coordinated and helped promote the grand opening of a coffee shop with a mission to provide vocational training for disabled individuals
- Through strategic planning and outreach efforts, successfully raised over \$5,000 to support the operations of the coffee shop
- Chaired and served as Vice President on the board of over 50 students, contributing to its foundation and subsequent leadership
- Facilitated meetings and collaborated with disabled trainees to promote the coffee shop and its mission
- Increased recruitment efforts, brining at least two representatives from each school in Greenwich to the board

Escuela Argentina Greenwich – Assistant Teacher | Greenwich, CT

September 2021 – April 2023

- Taught about Argentine culture and language, fostering a deep connection with the students' heritage
- Provided effective instruction in Spanish literacy, ensuring that every student left the classroom with the ability to read and write proficiently in Spanish
- Constructed lessons and scheduling, adopting organizational skills and managing limited time effectively

Sacred Heart Greenwich – Varsity A Field Hockey Captain | Greenwich, CT

August 2022 – January 2023

- Led the Varsity Field Hockey team to a highly successful season, achieving 16 consecutive wins, securing the FAA Regular Season Title
- Strengthened the program's reputation, resulting in a surge of interest among diverse range of students to join the team from all grades
- Fostered a culture of inclusivity, cultivating a competitive yet enjoyable environment; achieved consistently high participation rates during practices, indicative of the team's strong dedication and camaraderie

NON-TECHNICAL SKILLS & INTERESTS

- Languages: English & Spanish (native) | Nationality: Argentina (US Permanent Resident)
- Interests: Field hockey, music, running, baking, traveling
- Skills and Language(s): Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development | 5 Phases of Project Management | Creating Business Presentations 101 | Excel, Powerpoint & Word
- Other: Delta Gamma Fraternity

Ella Springer

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EDUCATION

University of Pennsylvania - Philadelphia, PA

GPA: 3.51/4.00

Candidate for B.A in Philosophy, Politics, & Economics, *College of Arts & Sciences*

May 2027

Minor: Real Estate & Urban Development, *The Wharton School*

Relevant Coursework: Accounting, Management, Macroeconomics, Microeconomics, Mathematics of Change, Writing Seminar

Industry Education: Wall Street Prep; 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101

Academy of the Holy Angels (High School)- Demarest, NJ

GPA: 98.97/100

June 2023

EXPERIENCE

Warburg Pincus- *Incoming MAP Diamond League Investment Fellow* | Remote

September 2024 – Present

- Selected as 1 of 50 second-year athletes to participate in a five-part fellowship designated to prepare URM athletes for careers in banking, receiving 20+ hours of virtual instruction in accounting, technical interview prep, & industry-specific training in banking
- Complete fellowship by advising Warburg on the potential acquisition of a small HVAC company with team of 5

MidOcean Partners- *Private Equity Summer Intern* | New York, NY

July 2024 – August 2024

- Shadowed MD, Business Services of PE Investment Team, attending board meetings for real-time decisions, assisting w/ presentation prep
- Monitored existing portfolio companies, conducting research, assisting with due diligence process, analyzing pitch book: sell-side, buy-side, potential targets, financial models & researched profitable return investments

Morgan Stanley- *Fixed Income Division x MAP Case Competition* | New York, NY (Remote)

March 2024 – May 2024

- 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, Stephen Dance
- 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
- Technical Skills Acquired: [Agile Project Management](#) | [Scrum Methodology](#) | [Tuckman’s 5 Stages of Group Development](#)

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Goldman Sachs Emerging Leaders Series – FICC and Equities (S&T) | New York, NY (Remote)

October 2024 – Present

- Developed industry knowledge, by completing technical training, receiving mentorship, and engaging in interview prep
- Engaged in firm-specific knowledge about Sales & Trading in the public markets

Evercore Freshman Discovery Day | New York, NY

July 2024

- Engaged in interactive Investment Banking simulation (AmplifyMe) with Director, Stephen Barnett w/ Strategic Advisory, Liability, Capital Markets, & Private Capital Advisory, ranging from private companies entering, through IPO & exiting the market, through PE
- Produced recommendation for hypothetical acquisition of two companies: Amazon & Gamestop through financial modeling & valuations

SEO Career- *SEO EDGE Participant* | New York, NY

June 2024 – Present

- Receive coaching and online instruction to achieve targeted interview, technical, and professional developmental goals
- Learn business fundamentals to compete successfully for internship opportunities
- Complete industry-specific training focused on developing technical skills, institutional knowledge, and attention to detail

Penn Women’s Fencing Team- *NCAA Division I Student-Athlete* | Philadelphia, PA

August 2023 – Present

- Devote 25+ hours a week to: practice/training, individual and team meetings, meets, lessons, travel, and team building
- Provide thoughtful leadership that is inclusive, transparent, & empowering, supporting team’s goal to develop teammates on/off the strip
- Develop results-oriented focus & skills in: communication, critical thinking, accountability, resiliency, teamwork, and time management
- Accomplishments: [All-Academic Team USA Fencing](#) | [Ivy League Women’s Fencing Champions 2024](#)

Wharton Women- *Fellow* | Philadelphia, PA

October 2023 – Present

- Spearhead social event planning to help balance Wharton Women’s professional activities, communicating with the five other branches of Wharton Women and other Fellows
- Research and discuss ideas about possible meeting topics, lead speaker outreach, & collaborate with different committees
- Planned and successfully executed the final general body meeting, with speaker panel, garnering 150+ attendees

Other Affiliations: Black Wharton Undergraduate Association, Wharton Investing & Trading, Kappa Alpha Theta

OTHER SKILLS & INTERESTS

Additional Experience: Make A Play Foundation (MAP) NXT Fellow, JPMorganChase CareerYou, Wells Fargo Project First Gen

Computer: Microsoft Applications (Excel, Word, & PowerPoint), Python

Interests: Environmental Nonprofit Work, French, Globalization, Traveling

Ellen Wang

Lexington, Massachusetts | 781-354-9613 | ellenw1@stanford.edu

EDUCATION

STANFORD UNIVERSITY

GPA: 3.95/4.00

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)

STANFORD, CA

Sep 2023 – Jun 2027

LEXINGTON HIGH SCHOOL

GPA: 4.15/4.00

LEXINGTON, MA

Sep 2019 – Jun 2023

PROFESSIONAL EXPERIENCE

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

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

- **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

Flora Caiyi Zhang

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EDUCATION

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

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

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

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

Interests: Outdoor Activities, Running, Cooking, Coffee

GIORDAN M. ISMAEL

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EDUCATION

Columbia University – New York, NY

GPA: 3.7/4.0

B.A. in Economics | ACT: 34

Anticipated Graduation: May 2027

- Accomplishments: NCAA D1 Athlete (Rowing); Coaches Award in 2022 and 2023; Rowing Team Captain; Cum Laude Society; Bioethics Scholar
- Relevant Courses: Principles of Economics, Calc 1, Calc 3, University Writing, Literature Humanities
- Industry Education by Spring 2024: 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

PROFESSIONAL EXPERIENCE

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

1/ 2024- Present

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

Indian Trail Club – *Lifeguard* | Franklin Lakes, NJ

06/2023 – 08/2023

- Supervised swimming pool and lake areas to ensure patron safety, developing strong observation and quick response abilities.
- Performed water rescues and first aid when necessary, forming communication skills for interacting with the public.
- Conducted regular checks of safety equipment and facilities ensuring a safe environment with 5-star reviews.

Café Amici – *Cashier* | Wyckoff, NJ

01/2023 – 05/2023

- Managed daily financial transactions with precision by totaling bills, receiving payments, and distributing receipts, demonstrating strong numerical proficiency and attention to detail.
- Handled phone calls for processing to-go orders and customer inquiries developing the ability to multi-task in fast-paced environments.
- Provided fast, efficient, and courteous service to all customers, enhancing customer satisfaction.

LEADERSHIP & COMMUNITY DEVELOPMENT

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

12/ 2023 – Present

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

Columbia University Rowing Team – NCAA Division I Student-Athlete | New York, NY

09/2023 – Present

- Adapted to team dynamics, participated in team practices and events, raced in 3V boat at the first team scrimmage.
- Recommended improvements to team captains, helping initiate changes to better prepare the team for racing season.

City Island Rowing – Team Captain | Bronx, NY

09/2023 – Present

- Motivated a team of varsity, JV, and novice rowers, fostering a cohesive and competitive environment and driving the team to achieve high-placing results in 8 regattas.
- Acted as a connection between coaches and team members, ensuring clear communication and effective resolution of team issues..
- Cultivated a supportive team culture, encouraging collaboration and support among team members, leading to an enhanced team environment for over 40 rowers.

City Island Rowing – Volunteer Assistant Coach | Bronx, NY

06/2022 – 08/2022

- Instructed groups of 5-10 students in novice rowing practices, helping new rowers develop and become confident in their rowing skills in 4 to 6 week cycles.
- Supervised 3-4 boats at a time, ensuring safety and proper rowing technique for rowers.

Kent Place School Bioethics Team – Bioethics Scholar | Summit, NJ

09/2020 – 06/2021

- Studied the intersection of ethics, medicine, public policy, and science, participating in 3-5 scholarly bioethics discussions a week.
- Conducted college-level research on a bioethics topic of my choice, culminating in an extensive 30-page academic research paper.
- Presented research and findings at the Kent Place Bioethics Symposium, giving a presentation to over 300 community members.

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Traveling, reading, playing the piano/guitar/ukulele
- Fun Fact: I am a certified lifeguard.
- Biggest Sports Lesson: Determination is much more than just a desire to win; it's about maintaining focus and effort, even when circumstances are tough and outcomes are not exactly what you expect.

HENRY C. LIU

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EDUCATION

Amherst College – Amherst, MA

B.S. in Economics/Computer Science | ACT: 35 | SAT: 1510

Anticipated Graduation: May 2027

- Accomplishments: NCAA DIII Student Athlete – Swimming, 3x USA Swimming Academic All-American, All NEPSA Team, Investment Club Member, Phillips Exeter Highest Honors Graduate
- Relevant Courses: Introduction to Economics, Introduction to Computer Science, Multivariable Calculus, The Economic of Inequality in the United States, Introduction to Computer Science II
- 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* | New York, NY (Remote)

February 2024 – March 2023

- 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 development of a 4-phase marketing strategy (trigger, action, reward, investment) to build awareness
- 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 the bank understand their goals, pain points, and 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 ahead of schedule

Kedron Swim Lessons – *Manager/Instructor* | Peachtree City, GA

June 2022 – September 2023

- Boosted enrollment from nine to 22 by strategically leveraging flyers and neighborhood Facebook pages to promote swim lessons.
- Managed all aspects of communications, scheduling, customer service, and contributed to company growth in a managerial role
- Instructed children spanning ages 4 to 18, encompassing true beginners to advanced swimmers

Centralplas LLC – *Marketing and Sales Intern* | Newnan, GA

June 2023 – August 2023

- Conducted comprehensive market research to analyze four key competitors, reaching out to potential clients with a demand for high volumes (>275 sheets per month) of corrugated plastic
- Spearheaded the marketing efforts for a new product, engaging with over 150 individual sign shops. Presented compelling pitches for both corrugated plastic and the innovative new offering
- Collaborated directly with the CEO as a liaison for approximately 20 new clients and companies seeking smaller-scale (<\$1000), non-wholesale orders of corrugated plastic

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
- Collaborated 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

Amherst College Varsity Swimming – Student Athlete | Amherst, MA

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

Kedron Swim Lessons – Manager/Instructor | Peachtree City, GA

June 2022 – December 2023

- Drove enrollment growth from nine to 22 by strategically utilizing flyers and neighborhood Facebook pages to promote swim lessons
- Managed comprehensive responsibilities as a manager, overseeing communications, scheduling, customer service, and contributing to the company's overall growth
- Instructed a diverse range of children, aged 4 to 18, encompassing both true beginners and advanced swimmers

Phillips Exeter – Proctor | Exeter, NH

August 2022 – June 2023

- Fostered an inclusive environment, ensuring the safety and inclusion of 40 community members
- Effectively communicated concerns to the dormitory team during weekly meetings, prioritizing the well-being of all students in the dorm
- Provided mentorship to 8 younger students, offering academic and developmental support through daily check-ins

Phillips Exeter Boy’s Swimming – Team Captain | Exeter, NH

November 2022 – March 2023

- Orchestrated weekly Captain’s Practices and orchestrated team outings to foster a cohesive community spirit
- Collaborated with coaches to devise high-scoring meet line-ups that showcased teammates’ strengths, resulting in an impressive 8-1 record
- Guided the team to achieve 6 High School All-American accolades and maintained an outstanding 8-1 dual meet record

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Traveling, Investigative Journalism, Puzzles, Music, Food (I have over 30,000 lifetime Chick-Fil-A points!)

Hudson Rivera

Rancho Santa Fe, CA | (858) 688 4042 | hudsonr@stanford.edu | www.linkedin.com/in/hudson-rivera

EDUCATION

Stanford University

Bachelor of Science in Science, Technology, and Society (Innovation Focus)

Stanford, CA
Expected June 2027

- GPA: 3.91/4.0
- Relevant Coursework: Financial Accounting, Economics, Ethics of AI, Designing Regenerative Societies

PROFESSIONAL EXPERIENCE

Lakeside Succession

Palo Alto, CA

Private Equity Fall Analyst

September - December 2024

- Collaborating with HBS alum Stephen Monk on industry research and sourcing acquisition targets for B2B white-collar businesses such as MSPs, HVACs, and TPAs by screening and assessing investment criteria using Capital IQ and Pitchbook
- Preparing financial projections, conducting valuation analyses (DCF), and drafting personalized outreach to business owners

Rhythm Holdings

San Francisco, CA

Investment Analyst

June - December 2024

- Assisting Stanford GSB alum Patrick Despres-Gallagher in sourcing deal flow for over 1,000 companies, resulting in 3 sourced targets proceeding to LOI and conducting in-depth market analyses for businesses focused on deepening human connection through experiences that intersect with technology, multimedia, events, and entertainment
- Performing market due diligence by researching the growth potential and competitive analysis for Venues, Venue SaaS, and Premium Event Equipment Rentals with EBITDA ranging between \$1M-\$10M and revenue between \$2M-\$50M
- Presenting actionable recommendations to the team by reviewing CIMs, speaking to founders and brokers, presenting scorecards, and conducting financial modeling to support deal evaluations using Excel and PowerPoint

LEADERSHIP & INVOLVEMENT

Warburg Pincus Investment Banking Case Competition – Make a Play Foundation (MAP)

Stanford, CA

Selected Case Experience:

December 2024 - Present

- Executing a comprehensive valuation analysis of a new potential acquisition of an HVAC company to fit within Warburg's investment strategy, approving the design of a 3-Statement Model used to forecast my team's financial statements for 5 years
- Producing a comparable company analysis, DCF sensitivity check, 5 financial assumptions to forecast key business drivers that will impact financials, and submitted a final pitchbook and CIM to Warburg's Human Capital Team

Stanford Finance

Stanford, CA

Analyst

November 2024 - Present

- Creating a 5-year DCF model for Apple using the perpetuity growth method and a sensitivity analysis on price-per-share
- Performing growth rate vs. WACC sensitivity analysis on Apple's implied price-per-share
- Attending exclusive networking events and workshops to prepare analysts for professions in the financial services industry

Charles R. Blythe Fund

Stanford, CA

Investment Analyst

March 2024 - Present

- Co-managing \$250,000 of Stanford University's endowment by investing in stocks, bonds, and cryptocurrencies
- Conducting competitive analysis and due diligence to optimize portfolio performance and manage risk

Stanford Varsity Men's Tennis

Stanford, CA

Student-Athlete

September 2023 - Present

- Team Captain for the 2024-2025 season
- Entered Stanford on scholarship as the #4 ranked recruit in the United States and #1 player in California
- Committing 25+ hours weekly to practices, training, and competition while managing a rigorous academic schedule
- Won the 2023-2024 Pac-12 Championship title and achieved a national team ranking of #9
- Competed in singles and doubles at the 2022 US Open Junior Championship

SKILLS, INTERESTS & VOLUNTEER

Technical Skills:

- Proficient in Microsoft Office | Google Suites | Pitchbook | Capital IQ | Financial Modeling | Grata

Personal Interests:

- Golf | Pickleball | Poker | Modeling (*Vuori*) | San Diego Padres | Stanford Blockchain | Kappa Alpha Order
- Actor in the movie, *Challengers*

Volunteer:

- Co-founded an afterschool program at Perkins Elementary, helping underserved K-8 students

Isabela A. Carvalho

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EDUCATION

Cornell University – College of Arts and Sciences

Ithaca, NY

Bachelor of Arts in Economics and Government | GPA 3.5 (Spring 2024)

Class of 2027

- Relevant Coursework: Calculus I, Microeconomics, Macroeconomics, Accounting, Intermediate Microeconomics

The Brearley School

New York, NY

Highschool Diploma | GPA 3.98

Graduated Jun 2023

PROFESSIONAL EXPERIENCE

44 Capital

São Paulo, Brazil

Investment Banking Summer Analyst

Jul 2024 – Aug 2024

- Performed financial analysis on 3 mid-sized companies, acquiring hands-on experience in deal execution and financial strategies.
- Created PowerPoint presentations on potential merger, evaluating operational efficiencies, risks, and long-term financial projections.
- Analyzed firm performance, growth potential, and industry trends with data-driven insights for team input and recommendations.

Wall Street Oasis

New York, NY

Financial Research Analyst

Feb 2024 – Apr 2024

- Authored 4 articles on business performance, corporate finance, and investment strategies, offering insights on future market trends.
- Completed 100+ hours of self-study in accounting, financial modeling, and valuation, including Excel and 3-statement modeling.
- Researched various financial industry practices, regulatory changes and trends to enhance article quality for an informed audience.

The Bar Room

New York, NY

Hostess

May 2024 – Jun 2024

- Optimized seating arrangements to reduce wait times by 15%, improving overall customer satisfaction and decreasing turnover time.
- Collaborated with Bar Room staff to anticipate customer needs, resulting in an 18% increase in service efficiency and response time.
- Reduced guest complaints by 20%, effectively solving issues and ensuring higher customer satisfaction, loyalty, and repeat business.

LEADERSHIP & EXTRACURRICULAR ACTIVITY

Cornell University NCAA Fencing Team

Ithaca, NY

Brazilian National Team

Aug 2023 – Present

- Brazilian Achievements: Pan-American Games Bronze Medalist, 4x National Champion, Junior and Senior World Team 2020-24.
- Cornell Achievements: NCAA Championship qualifier, two-time U.S. National Championship Medalist, Rookie of the Year.
- Demonstrated leadership and teamwork as key member of Cornell Fencing Team, resulting in improved team performance.

Cornell Latinos in Business

Ithaca, NY

Club Member

Sep 2024 – Present

- Completed a 10-week New Member Education in English and Spanish, focusing on technical and accounting financial principles.
- Engaged in weekly quizzes and coffee chats with club members to deepen knowledge of current events, markets, and investments.
- Attended networking and guest speaker events with prominent LatAm leaders, developing professional and leadership skills.

Delta Gamma Chi Chapter

Ithaca, NY

VP of Finance & Treasurer

Feb 2024 – Present

- Established and managed \$500,000 annual budget, ensuring accurate allocation and tracking of funds for sorority operations.
- Maintained comprehensive and accurate accounting records for 200 members, encompassing member dues, expenditures, and events.
- Managed 15+ sorority contracts and agreements, ensuring 100% compliance with all terms to effectively safeguard sorority interests.

Cornell M&A

Ithaca, NY

Club Member

Dec 2023 – Sep 2024

- Developed and presented detailed valuation and financial considerations of 5 past M&A transactions to senior club members.
- Conducted comprehensive industry research and due diligence on 4 companies, identifying potential mergers and acquisition targets.
- Collaborated with peers on financial models to assess company valuations, refining analytical skills through M&A simulations.

SKILLS, LANGUAGES & INTERESTS

Fellowships: Make-a-Play Foundation Incoming D-League Fellow

Languages: Fluent in Portuguese, highly proficient in Spanish, proficient in French

Skills and Certifications: Proficient in Excel, PowerPoint, completed Wall Street Oasis accounting course.

Interests: DJing house music, travelling, reading fiction, a-cappella singing, foreign languages, road-biking, breakfast foods, podcasts.

ISABELLA K. CHIN

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EDUCATION

Harvard University – Cambridge, Massachusetts

GPA: 3.7/4.0

B.A. in Economics | Secondary in Computer Science | SAT: 1480

Anticipated Graduation: May, 2027

- Accomplishments: Harvard Varsity Fencing Team, Division I NCAA – 2024 NCAA Team National Champions and 2024 NCAA Individual Fencing Second Team All-American
- Relevant Courses: Introduction to Computer Science, Multivariable Calculus, Introduction to Microeconomics, Introduction to Macroeconomics, Intermediate Microeconomics, Intro Quant Methods for Econ (Statistics)

PROFESSIONAL EXPERIENCE

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 final management presentation to BofA's Talent Acquisition team
 - Co-designing a 3-statement model to forecast the healthcare company's income statement, balance sheet, and cash flow statement for up to 5 years, simultaneously researching key healthcare data market trends to clearly articulate the company's positioning + strategy

New York Fencing Academy – *Camp Counselor and Referee* | Manhasset, New York

09/2020 – Present

- Led and coached intermediate athletes in skill development and strategy; conducted training sessions at international fencing camps, Enhanced athletes' technical abilities and prepared them for competition
- Guided younger athletes through college recruiting process and preparation for domestic and international competitions; provided mentorship and strategic advice to aspiring fencers; helped athletes navigate recruitment and excel in global fencing events
- Refereed multiple sanctioned fencing competitions; oversaw matches at the fencing academy, ensuring adherence to official rules and fair play, Maintained competitive integrity and supported athletes' development

LEADERSHIP & COMMUNITY DEVELOPMENT

London School of Economics and Political Science – *Student* | London, England

07/2024 – 07/2024

- Participated in an exclusive summer study abroad program; collaborated with a diverse group of students from around the globe; expanded global perspectives and engaged in cross-cultural academic and personal growth
- Engaged in hands-on problem-solving and group discussions; applied macroeconomic theories to real-world scenarios, exploring their practical implications; fostered analytical skills and teamwork to address complex global economics challenges
- Completed Intermediate Macroeconomics coursework, Mastered concepts including budget constraints, monetary and fiscal policy, credit-market imperfections, business cycles, inflation, banking, and unemployment; developed foundation to evaluate macroeconomics trends

Women in Computer Science – *Club member* | Cambridge, Massachusetts

09/2023 – 12/2023

- Attended meetings and social events focused on community-building; connected with other women interested in computer science during the fall semester; fostered a supportive network and explored shared interests in computer science
- Engaged in discussions on challenges faced by women in tech; explored solutions and strategies to promote inclusion and equity; aimed to create a more diverse and innovative industry
- Attended career development workshops and mentorship programs; created a supportive environment for underrepresented voices in technology; built confidence and gained skills to advance career

USA Fencing/Harvard Varsity Fencing Team – *Team Member* | Cambridge, Massachusetts

09/2013 – Present

- Competed internationally and domestically in fencing at World Cups and National Championships, Represented the US in Junior and Cadet age categories; secured multiple titles, including World Cup and National Championship golds
- Led the Harvard Varsity Fencing Team in the 2024 NCAA championship; played a crucial role in the team's success during the competition; contributed to securing a historic victory for the team
- Ranked 5th in the world in the Junior age category and 10th in the US in the Senior age category; achieved these rankings in 2023 through consistent high-level competition; established a top-tier standing in both global and national fencing competitions

Harvard Financial Analysts Club – *Club Member* | Cambridge, Massachusetts

09/2024 – 12/2024

- Learned how to evaluate businesses, read financial statements, understand accounting principles, and build financial models; developed skills to assess company performance and value, Gained expertise in comparing and quantifying businesses' financial health and value
- Analyzed prominent companies through group discussions; evaluated their strengths, weaknesses, and market strategies; gained insights into their competitive advantages to understand what drives their success
- Prepared and pitched a stock at the end of the semester; utilized financial analysis, modeling, and valuation techniques to access the stock; convinced others of the stock's investment potential based on solid evidence

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Crocheting, pickleball, baking, dystopian action movies

JACKSON H. DUNCAN

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EDUCATION

Amherst College – Amherst, MA

GPA: 3.84/4.00

B.A. in Economics & Psychology

Anticipated Graduation: May 2027

- Accomplishments: Selected to football leadership council; DEI committee rep for football team
- Relevant Courses: Economics, Environmental, Social, & Governance Policies, Calculus
- Wall Street Prep Education by 2025: Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

PROFESSIONAL EXPERIENCE

Advent International – Incoming Deal Team Intern | Boston, MA

July 2025 – August 2025

- Expected to create investment thesis about a company, present it to senior management, and assist with deal/portfolio work

Presidio Park Group – Private Equity Fall Analyst | New York, NY (Remote)

July 2024 - Present

- Selected as one of 8 search fund analysts out of a pool of 200+ applicants
- Conduct company research within specific industry niches and rank these companies based on their overall compatibility with Presidio Park's investment methodology; researched over 225 companies in over 10 unique industry niches so far
- Assist in live deal work & investor engagements, including deal-specific analysis and investment memo creation

Visa – Treasury as a Service Intern | Wilton, CT

May 2023 - June 2023

- Analyzed business model and revenue generation; synthesized consumer transactions, issuing/acquiring banks, and merchants under the direction of GM in TaaS
- Discussed strategies for creating new revenue flows, which included new methods of transactions within the 5 realms that Visa focuses on: P2P, B2C, B2B, B2b, and G2C
- Presented findings to a cohort of 12; educated them on the basics of Visa and its business model

Silver Spring Country Club – Senior Golf Caddy / Outside Operations Staff Member | Ridgefield, CT

May 2021 - Present

- Oversaw the training of three new caddies and two new outside operations staff members; provided club and course advice

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 – November 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

BLK Capital Management – Equity Research Trainee | Cambridge, MA

October 2024 - Present

- Complete semester-long education program covering the fundamentals of industry analysis, accounting, and financial modeling

Black in Business Club – President & Co-Founder | Amherst, MA

September 2024 - Present

- Established group that allows Black & Latino students to discuss business and finance-related topics
- Coordinate guest speaker events with Black & Latino Amherst alumni who have become successful within the finance world

SEO Career – SEO EDGE Participant | New York, NY

March 2024 - Present

- Received coaching and online instruction to achieve targeted interview, technical, and professional developmental goals
- Completed industry-specific training and learned business fundamentals to develop technical skills, institutional knowledge, and attention to detail to successfully compete for internship opportunities

Scholars of Finance – VP of Member Experience | Amherst, MA

December 2023 - Present

- Organize club events such as chapter socials, Q&A sessions, and engagement events; increased membership by 25% in 2024
- Formulated a chapter mentorship program that pairs junior club members with senior club members who provide guidance regarding finance recruiting, networking, and interview prep

NON-TECHNICAL SKILLS & INTERESTS

- Skills and Language(s): Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development | Spanish (Limited Working Proficiency)
- Interests: Golf course architecture, Green Bay Packers, 20th-century U.S. military history, Visiting family in six different countries

JAMARI A. MYERS

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EDUCATION

Brown University – Providence, Rhode Island

GPA: 3.75/4.0

B.A. in Business Economics & East Asian Studies (Chinese)

Anticipated Graduation: May 2027

- Accomplishments: NCAA Division I Student-Athlete (Football)
- Relevant Courses: Principles of Economics, Intermediate Microeconomics, Financial Accounting, Intermediate Chinese
- Industry Education by Spring 2024: 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

EXPERIENCE

National Football League (NFL) – *Incoming DE&I Student Consultant* | New York, NY (Remote)

February 2024

- Expected to introduce a new policy to the NFL that fosters + provides opportunity to diverse leadership across the league, performing a gap analysis of the current “Rooney Rule” to reimagine ways to increase the % of ethnic minorities hired in head coach & executive positions

Vector Marketing/Cutco Cutlery – *Sales Representative* | Plano, TX

June 2023 – August 2023

- Presented Cutco Products directly to consumers through virtual and in-person appointments, successfully securing over 90 appointments
- Generated leads and called potential customers through over 200 personal referrals, executing 300+ calls with a 30% conversion rate
- Participated in a regional Summer Conference, interacted with accomplished speakers and expanded my professional network to enhance knowledge and connections

PINSTACK – *Party/Group Host* | Allen, TX

June 2022 – June 2023

- Hosted birthday parties and large group events, collaborating with managers, kitchen staff, and technical workers to ensure a positive experience for all customers
- Effectively upsold additional products and services, elevated customer experiences, and increased revenue growth
- Adapted in a chaotic environment by skillfully navigating dynamic situations, ensuring flawless event execution; maintained a steadfast commitment to customer satisfaction and contributed to sustained growth

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – King’s Court Fellow ’23 (Winter Cohort) | Remote

December 2023 – Present

- Selected as 1 of 50 college athletes to participate in a fellowship that prepares African American male 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 NFL to increase the % of ethnic minorities in executive positions
 - Technical Skills Acquired: Agile Project Management | Scrum Methodology | Tuckman’s 5 Stages of Group Development

Brown Football Team – NCAA Division I Student-Athlete | Providence, Rhode Island

August 2023 – Present

- Demonstrated commitment to continuous learning by actively participating in film analysis, playbook reviews, and discussions on defensive strategies, while investing over 25 hours weekly in sports-related activities
- Balanced academic responsibilities with the demands of being a Division I student-athlete while maintaining an academic GPA of 3.5+
- Enhanced team culture by exhibiting a strong work ethic and discipline, contributing to the improvement of the team record to (0.500)

Chinese Learners Connect – Chief of Outreach, Tutor | Remote

June 2023 – January 2024

- Contributed to the creation of a non-profit initiative promoting Chinese language and culture education for students of color; facilitated the recruitment and management of four active tutors, expanding the network's educational resources
- Provided weekly tutoring and mentoring services, dedicating up to 3 hours per week; established enduring relationships and connections with People of Color (POC) engaged in Chinese language studies
- Cultivated a conducive learning atmosphere, equipping tutors with effective study habits and skills for tutees, resulting in a 100% improvement in test scores, listening, and reading comprehension for all participants under my guidance

Families in Transition – Service Learning Team Member | Manchester, NH

November 2022 – March 2023

- Volunteered over 50 hours to Process and contribute donations to help FIT carry out their mission of hunger relief, emergency shelter, safe affordable housing, and supportive services to individuals enabling them to gain self-sufficiency and respect
- Implemented a new processing system to enhance the efficiency of donation processing, collaborating with a team of 10 students; the expedited process enabled the team to undertake new tasks and expand the range of services for previous volunteers
- Collated school-wide donations from each dormitory and delivered a presentation to a student body of over 500, shedding light on food insecurity and the American poverty issue to effectively raise awareness

North Texas Food Bank – Volunteer | Plano, TX

June 2022 – August 2022

- Volunteered 40 hours during school breaks to volunteer, assisting in packing and shipping nutritious care packages for low-income families and senior citizens in Collin County
- Assisted in processing and packaging meal boxes, contributing to the organization's ability to produce over 200,000 meals for individuals in need during my hours volunteered

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Mindfulness & meditation, culture enthusiast, journaling, investing, photography, cryptocurrency/blockchain, real estate.

JIM JI

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EDUCATION

Yale University – New Haven, CT

GPA: 3.93/4.0

B.A. in Economics and Math | ACT: 34

Anticipated Graduation: May 2027

- Accomplishments: NCAA D1 Athlete, U18 National Champion, Junior US Open Participant, Blue Chip Recruit, AP Distinguished Scholar
- Relevant Courses: Microeconomics, Macroeconomics, Data Exploration and Analysis, Calculus I, Calculus II
- 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* | New York, NY (Remote)

February 2024 – March 2024

- Collaborated with a team of 5 to deliver a 3-year transformation strategy to Wells’ Talent Strategy team, specifically tasked with managing my team’s finances to expand the wealth-building capacity of property ownership and affordable rental housing in URM communities
- 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 guide Wells on how it should deploy its budget across 3 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
- Developed a KPI framework that organized our business objectives, goals & key performance indicators into a single chart, systematically articulating my team’s shared vision & providing the bank with a centralized framework to track our progress/take improvement action(s)

ICL Academy – *House Leader* | Los Angeles, CA

August 2021 – May 2023

- Planned school events such as game nights and spirit weeks that drew the participation of 100+ students which helped increase camaraderie
- Selected 5 students based on their merit and capabilities and delegated them to roles such as treasurer & secretary to help organize events
- Gauged many ideas and suggestions from students on the chances of their potential responses from the school’s leadership and then communicated over 20 of them to school supervisors and administrators

Youth Tennis San Diego Junior Council – *Treasurer* | San Diego, CA

October 2021 – September 2022

- Managed over 1000 dollars in funds and was in charge of keeping track of and authorizing all purchases, recommending event ideas for multiple events to the council that would more effectively allow us to fundraise money
- Took suggestions from others on the council on which events and fundraisers would be the most successful, which led to the council gaining over 3000 dollars in funds

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

Yale Men’s Varsity Tennis Team – *Member* | New Haven, CT

August 2023 – Present

- Provided feedback to coaches twice each semester to discuss areas of improvement in practice and scheduling, resulting in a four-point improvement in the team’s UTR rating
- Hosted three potential recruit prospects for our team, and it resulted in a commitment from one of the five-star recruits
- Coordinated weekly team dinners that improved bonding between teammates and increased teammate chemistry, especially allowing the first-year recruits to bond with their teammates

USTA – *Regional Team Captain* | Grand Rapids, MI

July 2022 – August 2022

- Worked with team’s coach to coordinate 5 team practices throughout the week of competitions & eventually found tennis courts to train on
- Planned three team dinners, a player party, and other gatherings with the team to create chemistry and bonds
- Wrote a thank you letter on behalf of the team to thank our coach for guiding us and coaching us through this tournament; gathered signatures and notes from all 10 team members

The Bishop’s School Varsity Fencing Team – *Team Captain* | La Jolla, CA

August 2019 – May 2021

- Planned weekly team dinners to increase already established team chemistry and form greater bonds between teammates on/off the court
- Facilitated around 6 practices, when the coach was unable to be present, leading practice on my own and guiding them through training drills and speaking with my head coach each week to point out and discuss areas of improvement and recommend training drills to help improve our team

San Diego Food Bank – *Packager* | San Diego, CA

August 2019 – May 2021

- Handled fruits and vegetables by packaging them and assorting them for the food bank, in total I packaged over 1000 sorted bags of vegetables and fruits
- Inspected all of the fruits and vegetables to ensure that they are fresh and ripe. Examined over 5000 fruits and vegetables to ensure that they are fresh and ripe for the food bank
- Assembled over 5000 boxes of canned fruits and soups for the food bank. Constructed over 500 cardboard boxes of soups and fruit

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Math, Computer Science, Finance | Languages: Fluent in English and Mandarin.

Kaitlyn Pak

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Education

Harvard College

Cambridge, MA

GPA 3.7/4.0, A.B. Candidate Applied Math with Secondary in Computer Science

May 2027

- *Related Coursework:* Intro to CS and Programming, Intro to Statistics and Data Science, Using Big Data to Solve Economic and Social Problems, Discrete Mathematics for CS, Introduction to Probability, Linear Algebra
- Varsity Women's Fencing Team (Saber), Division I NCAA, commit 25 hours per week
- 2024 NCAA Team National Champions, 2025 Women's Ivy League Champions

High Tech High School

Secaucus, NJ

GPA 4.7, ACT 35, Academy for Design and Fabrication: Computer Science

June 2023

- *Eagle Scout BSA:* Founding member of local troop, achieved Eagle Rank through fundraising and organizing the renovation of prayer space at local church
- *ENGIN (501(c)3, nonprofit):* Providing English instruction to Ukrainian youth through conversation

Professional Experience

BDO USA

New York, NY

Incoming Strategy and Innovation Intern

June - August 2025

Harvard Academic Resource Center

Cambridge, MA

Tutor

August 2024 - Present

- Providing tutoring for Computer Science, Economics, Math, and Statistics courses
- Guiding students on coursework, practical application, and conceptual understanding of materials

Harvard University Math Department

Cambridge, MA

Teaching Leader

June - September 2024

- Instructed 10+ students on college-level calculus. Broke down coursework into simple materials
- Held bi-weekly classes, supplementary assistance, and problem-solving sessions. Reviewed assignments and provided personalized feedback in a timely manner

Mayo Clinic

Rochester, MN & Jacksonville, FL

Clinical Research Intern

May - August 2024

- Researched Ehlers-Danlos Syndrome through statistical analysis and interpretations. Evaluated the application of NLP tools in qualitative analysis using NVivo, Excel, PowerPoint, and R. Compiled and presented findings at conferences
- *Research Presentations:* "Evaluation of Human and AI Performance in Identifying Decision Making Themes from Clinical Encounters," "The Evidence of Racial Bias in Artificial Intelligence for Women's Health"

LEADERSHIP COMMUNITY DEVELOPMENT

Make a Play Foundation

Remote

Winter Fellow

January 2025 - Present

- Selected to participate in Phase 1 of an exclusive fellowship for high-achieving college athletes, competing against 200+ others in weekly mock interviews to proactively implement learnings from 3 modules + 10 hours of instruction on behavioral/technical/hybrid interview preparation.
- Attend weekly virtual recruiting events with MAP's diverse rolodex of partners (Evercore, NFL, Microsoft, Morgan Stanley, Procter & Gamble), learning how to transform my experience as a student-athlete into a successful post-playing career at a leading company.

Tech and Global Health Initiative: Harvard University

Cambridge, MA

Member

September 2024 - Present

- Participating in conversations, workshops, and lessons with leaders at the intersection of technology and healthcare
- *Topics:* AI and Global Health, Diagnostics and Bioengineering, Precision Medicine

Harvard Financial Analyst Club

Cambridge, MA

Member

September 2024 - Present

- Engaging in a community of undergraduates passionate about real-world investing. Practiced basics including comparative analysis and stock pitching
- Stock Pitch (December 2024) including investment thesis, industry analysis, and risk analysis

USA Fencing

New York, NY

National Team Member

September 2019 - Present

- Competing in individual and team competitions domestically and internationally in various age groups.
- Junior and Senior Women's Saber National Team Member (Junior and Cadet World Championships, World University Games, Pan American Junior Championships)

Skills & Interests

Skills: Microsoft Excel, Word, PowerPoint, R, C, SQL, Java, Python, HTML, CSS

Interests: Cooking Asian cuisine, traveling, reading literary fiction, indoor cycling, learning Mandarin

KENNEDY A. GRIPPO

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EDUCATION

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

GPA: 3.89/4.0

B.S.B.A. in Finance and Accounting; Student-Athlete

Anticipated Graduation: May 2027

- Accomplishments: Dean's List (All Eligible Semesters) and Easton/NFCA All-America Scholar-Athlete
- Relevant Courses: Capital Markets and Financial Management, Financial Accounting, Microeconomics, Managerial Statistics I and II, Intermediate Financial Accounting I, Carbon Accounting, Advanced Financial Management, Small Business Initiative
- Wall Street Prep Education by 2025: Accounting Crash Course, Investment Banking Interview Guide, Investment Banking Soft Skills

PROFESSIONAL EXPERIENCE

Insight Enterprises – Jr. Client Solutions Director Intern | Chicago, IL

06/2024 – 08/2024

- Led a comprehensive team-wide assessment, including interviews, data analysis, PowerPoint creation, recommendations for improvement, and presentation to the team's head executive to improve sales efficiency
- Performed 10 client-facing Discovery and PreSales calls to identify requirements, pain points, and goals
- Analyzed 64 clients' financial data, contributing to accurate account forecasting and budgeting, and developing a solid understanding of how financial metrics drive sales strategies

Virtual Enterprises International (VEI) – Purchasing Vice President | Crystal Lake, IL

08/2022 – 05/2023

- Formulated purchasing strategy by creating a pricing database in Excel and performing a break-even analysis
- Managed a virtual B2C promotional items company, including product ideation and development of 11 unique products
- Controlled trade show operations, overseeing logistics, in-booth sales, and delivering a compelling pitch at the Illinois Business Plan Competition

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, and cash flow statement for up to five years
 - Submitting a final pitchbook and single master document (CIM) outlining the materials produced by the project, formally closing the project and transferring all materials/solutions to Warburg's Human Capital Team

Student-Athlete Advisory Committee (SAAC) – *Career Engagement Committee Member* | St. Louis, MO

08/2024 – Present

- Coordinate four workshops, panels, and events per year focused on career readiness topics like resume building, interview preparation, and networking to help student-athletes confidently transition from athletics to the workforce
- Administer peer support by sharing insight into leveraging athletic experiences in career-focused environments
- Collaborate with athletic and career departments to effectively tailor resources and opportunities to student-athletes

Washington University in St. Louis Varsity Softball – *Student-Athlete and Leadership Representative* | St. Louis, MO

08/2023 – Present

- Dedicate 30+ hours to weekly training, practices, meetings, games, and travel in addition to academic obligations
- Campaign as a nominated team representative for the WashU Bauer Leaders Academy, cultivating advanced leadership techniques to empower teammates to set and achieve attainable goals
- Analyzed game footage to identify growth opportunities, track progress, and develop effective game plans, resulting in a second-place finish in the conference and hosting Regional Playoffs for the first time in WashU Softball history
- Arranged effective athletic drills and mental health initiatives to strengthen team productivity and camaraderie, which led to seven University Athletic Association honors and a winning team performance record

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 three modules on interview preparation and business communications
- Competed in three group mock interviews against 50+ other college athletes, receiving a 'very strong' rating in at least two of the interviews, advancing to Phase 2 of the fellowship ("the team competition") with Warburg's Human Capital Team

NON-TECHNICAL SKILLS & INTERESTS

- Skills and Language(s): Agile Project Management, Scrum Methodology, Tuckman's 5 Stages of Group Development, Microsoft Office, Data Analysis, Leadership, Relationship-building, Time Management, Communication, Collaboration, Adaptability
- Interests: Hiking, Pickleball, Softball, Animals, Traveling, Volunteering

ALEXA H. FRIESEL

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EDUCATION

Cornell University – Ithaca, NY

GPA: 4.164/4.300

B.A. in Economics | Minor in Business | ACT: 36

Graduation Year: 2027

- **Accomplishments:** NCAA Division I Student-Athlete (Women's Polo) | Society for Women in Business Executive Board | Big Red Ambassador for Cornell Admissions | President's Service Award - Gold Level | 2X AP Scholar with Distinction | National Merit Commended Student
- **Relevant Courses:** Finance | Financial Accounting | Intermediate Microeconomics | Intermediate Macroeconomics | Probability Models | Marketing | Business Management

PROFESSIONAL EXPERIENCE

Searchlight Capital Partners – *Incoming Summer Analyst, Private Equity* | New York, NY

06/2025 – 07/2025

- Accepted offer to partake in eight-week summer private equity internship program at leading alternative investment firm

Cornell Football Team – *Student Manager & Photographer* | Ithaca, NY

08/2023 – PRESENT

- Manage equipment, support drills, and team operations, and handle videography to aid coaching and performance
- Take extensive and dynamic photographs of game action and team practices, promoting Cornell University's football team

Oak Hill Advisors – *Summer Analyst, Private Credit* | New York, NY

05/2024 – 06/2024

- Analyzed financial performance of prospective and current portfolio companies, including projecting future cash flows
- Researched SEC filings for model updates and drafted company summaries for past and present investment opportunities
- Created Excel-based dashboard to track and display financial metrics including private credit holdings and credit spreads

Lululemon – *Educator* | Burlingame, CA

01/2023 – 08/2023

- Provided personalized product knowledge and fitness advice to enhance customer experiences and to drive store revenues
- Conducted SWOT and store financial performance analyses, communicated internally to coworkers to drive sales efficiency

Mountain Camp Woodside – *Summer Camp Counselor* | Woodside, CA

06/2021 – 08/2022

- Engaged elementary-age campers in various activities, promoting teamwork, safety, and development of life skills

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

11/2024 – PRESENT

- Participating in a 2-part fellowship for high-achieving college athletes looking to prepare for professional success in banking
- Meet with MAP's various partners in finance to learn more about the banking industry (i.e., Bank of America, Evercore, Guggenheim)

Society for Women in Business – *Vice President, Alumni Relations* | Ithaca, NY

09/2024 – PRESENT

- Lead Cornell's largest undergraduate women's organization, driving initiatives to empower and support women in business
- Coordinate mentorship programs, manage alumnae database, organize NYC trip, and liaise between alumnae and members
- Design behavioral and technical interview prep programs to help club members prepare for competitive job interviews
- Evaluated Mars-Hotel Chocolat M&A deal in fall investment banking cohort, earning top presentation score of 20 groups

Cornell University Women's Polo – *Student-Athlete* | Ithaca, NY

09/2024 – PRESENT

- Dedicate 10-15 hours weekly to mounted practices, strength training, conditioning, matches, and completing facility chores

Big Red Sports Network – *Photographer & Digital Media Content Creator* | Ithaca, NY

08/2023 – PRESENT

- Capture and curate visual content as sports photographer, demonstrating proficiency in various technical settings and editing
- Contribute creative ideas to assist in producing high-quality multimedia content for visual storytelling of campus athletics

Cornell Admissions – *Big Red Ambassador* | Ithaca, NY

08/2023 – PRESENT

- Collaborate with team of students and university staff to improve admissions process for prospective Cornell applicants
- Develop marketing materials and educate high school students about academics and extracurricular opportunities on campus

NON-TECHNICAL SKILLS & INTERESTS

- **Skills and Language(s):** English (Native) | Spanish (Intermediate) | American Sign Language (Elementary)
- **Programs:** Evercore Women's Leadership Summit | RBC Women's Advisory Program | KKR Diversity Insights Symposium | JP Morgan Career.edYOU Academy | Morgan Stanley Investment Banking Early Insights | Bain & Company C.R.E.W.
- **Interests:** Weight Lifting | Fitness | New York Sports Fan | Morning Brew | Restaurants | Hiking | Travel | Running

LILY K. BRITT

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EDUCATION

Harvard University – Cambridge, MA

GPA: 3.859/4.0

B.A. in Applied Mathematics (Engineering Track) | Minor in Arts, Film, & Visual Studies | ACT: 36

Graduation Year: 2027

- Accomplishments: Varsity Water Polo, Women in Entrepreneurship
- Relevant Courses: Math through 21b, STAT 110, ES120 (Solid Mechanics), Physics 15a, AM 50 (Python and modelling)

London School of Economics – London, UK

GPA: 4.0/4.0

- Courses in Macroeconomics and Microeconomics

Summer 2024

PROFESSIONAL EXPERIENCE

Poppy Street Interiors – *Design Intern* | Newport Beach, CA

May 2023 – September 2024

- Contributed to design planning process for large scale residential tear-downs
- Organized office operations to improve workflow and efficiency
- Contributed to procurement of materials, ensuring quality and staying within budget

Harvard Athletics – *Analyst* | Cambridge, MA

September 2024 – Present

- Extracting team and player offensive and defensive metrics from water polo games to assess game performance
- Generating quantified scouting reports on opponent strategy and tendencies in order to best inform our team's game plan

Girls' Girl Co. – *Co-Founder* | New York, NY

March 2021 – August 2023

- Along with my two sisters, founded a hat company with aims of spreading empowering messages for women globally
- Proceeds went back to WSF, Black Girls Code, Malala Fund, BRAVE, and Girls on the Run

LEADERSHIP & COMMUNITY DEVELOPMENT

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

January 2025 – Present

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

Boys and Girls Club of Boston – *Volunteer* | Boston, MA

September 2023 – Present

- Running Water Polo clinics for youth in the greater Boston area in an effort to expose more East Coast youth to the sport, make lasting connections with and empowering underserved kids in Boston
- Program has received tremendous feedback for fostering technical and teamwork, abilities, getting children more comfortable in the water, and teaching the power of sports opportunity

Thirst Project – *Volunteer* | Newport Beach, CA

September 2019 – June 2023

- Fundraising efforts for wells for the Thirst Project - world's largest youth-led water organization that works with the support of students to end the global water crisis by building freshwater wells in developing communities in need of safe, clean drinking water
- My cohort within the Academy of Global Studies built a well in Lumphondvweni/Mdumezulu, Swaziland

ADDITIONAL SKILLS

- Skills and Language(s): Proficient in Spanish, Python, Excel
- Interests: Painting, Photography, Open Water Swimming, Reading

MAEVE E. KELLEY

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EDUCATION

Amherst College – Amherst, Massachusetts

GPA: 3.9/4.0

B.A. in Economics and Spanish

Anticipated Graduation: May 2027

- **Accomplishments:** NCAA Division III Student-Athlete (Swimming); Gordon P. Berry Memorial Award, NESCAC Women's Swimming Rookie of the Year, First-Team All-American, Cum Laude Society
- **Relevant Courses:** Introduction to Economics, Well-Being and Economic Thought, Microeconomics, Calculus, Police Power
- **Industry Education by Spring 2024:** 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

PROFESSIONAL EXPERIENCE

JMI Equity – *Incoming Product & Technology Student Consultant* | New York, NY (Remote)

July 2024

- Expected to deliver a transformation strategy to JMI outlining innovative ways to enhance the firm's artificial intelligence & cybersecurity capabilities, ultimately looking to help JMI & its portfolio companies gain a competitive advantage in times of rapid technological change

Macado's Restaurant – *Waitress* | Blacksburg, VA

May 2024 – Present

- Communicated daily with hosts and other staff members to maximize restaurant space and regulate restaurant flow, resulting in shorter food wait times and increased customer satisfaction
- Oversaw the creation of weekly schedules in collaboration with managers for servers, hosts, cooks, and dishwashers that accommodates many time-off requests, gaining insight and first-hand experience in managing employees and addressing scheduling conflicts
- Trained new employees in how to handle customer complaints and requests, various side work responsibilities, and the POS system, leading to smooth transitions and easy integration for new hires who could quickly pick up on key skills

Shady Grove Grill – *Hostess* | Pittsburgh, PA

05/2022 – 08/2023

- Solicited feedback from managers and servers on how to better manage rushes, customer and server requests, and space regulations, leading to better communication skills between coworkers and managers and improved performance during peak hours
- Implemented a rotation strategy to ensure each server was seated evenly, considering the number of guests in a party and their seating preferences, resulting in an increase in restaurant efficiency and the maximization of tip collection for servers
- Strengthened marketing strategies by distributing flyers when seating customers and designing street signs displaying special events, leading to increased awareness of daily specials and attendance at weekly karaoke and DJ events

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – Summer Fellow '24 | Remote

June 2024 – Present

- Selected as 1 of 100 college athletes to participate in a fellowship designed to prepare under-resourced athletes for professional success
- Receive 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
- Collaborating with a team of 6 athletes to provide specific recommendations on how JMI Equity can execute new A.I. initiatives in 5 weeks
 - Technical Skills Acquired: [Agile Project Management](#) | [Scrum Methodology](#) | [Tuckman's 5 Stages of Group Development](#)

Amherst College Women's Swimming & Diving – NCAA Division III Student-Athlete | Amherst, MA

October 2024 – Present

- Fostered connections between fellow first years and potential recruits through various on-campus activities
- Articulated feedback from fellow members of the first-year class to the new head coach, improving the team atmosphere
- Headed communication between recruits and the first-year class through phone calls with recruits and representing the first-year class at parent panels, resulting in the fastest recruiting class in recent program history for the upcoming school year
- Managed the collection of funds and goods from parents for teammates, contributing to the team's ability to purchase custom water bottles for every swimmer competing at the NCAA Championship
- Strengthened communication between the first-year class and the new coaching staff through frequent coach's meetings and conversations with fellow first years, leading to improved team culture and atmosphere on the pool deck

Shady Side Academy Prom Committee – President | Pittsburgh, PA

12/2021 – 05/2022

- Streamlined communication between the student body and administrators through frequent emails and google form surveys, leading to high satisfaction rates from students about the event while staying within the guidelines of the administration
- Corresponded with 20+ event venues, catering companies, and potential entertainment businesses through email and phone calls, carefully weighing the benefits and drawbacks of each, contributing to high satisfaction rates among students in attendance
- Drafted multiple budget plans for each potential venue, including itemized lists for food, drinks, and entertainment, to maximize the provided funds, helping the final price of the event come in below budget

Pittsburgh Leadership Forum for Young Women – Member | Pittsburgh, PA

05/2022

– 06/2023

- Contributed 40+ hours of volunteer work at the Pittsburgh Zoo and Aquarium through educational booth stationed across the Zoo, resulting in increased community support for educational pursuits benefiting the local youth
- Facilitated discussions at monthly speaker events for members pertaining to personal branding and supporting local women in business pursuits, leading to increased morale and confidence among participants and networking opportunities

NON-TECHNICAL SKILLS & INTERESTS

- **Interests:** Yoga, Baking, Dachshunds, Electronic Music, Hiking, Fiction Books, Entrepreneurship

Marcello E. De Antunano

Salt Lake City, UT | 972.804.6351 | marcello.deantunano@gmail.com | LinkedIn.com/in/marcello-deantunano/

EDUCATION

University of Utah

Bachelor of Science, Finance | *David Eccles School of Business*

Expected Graduation: May 2027

Cumulative GPA: 3.5/4.0

Awards: Dean's List, ALPFA Goldman Sachs Scholarship, 1x Silver Medal IIHF U18 WJC D3A

Relevant Coursework: Microeconomics I; Descriptive Statistics; Financial & Managerial Accounting Fundamentals; Finance Fundamentals

Organizations: Finance Club (Vice President of Recruitment & Marketing), HeadStart Fellowship (Chief of Staff), Make A Play Foundation (Diamond League Fellow), Opportunity Scholars, ALPFA (Executive-Board), Hispanic Finance Association (Univ of Utah Chapter Member)

PROFESSIONAL EXPERIENCE

Nomura

Incoming Sophomore Summer Analyst

New York, NY

Starting June 2025

Warburg Pincus | MAP Participant

Private Equity Student Analyst

New York, NY

Nov 2024 – Present

- Collaborated closely with a deal team of five student-athletes to advise Warburg on the potential acquisition of a small HVAC company

University Growth Fund | \$83M AUM; Largest Student-Run VC Fund in the U.S.

Salt Lake City, UT

Growth Equity Analyst

Sep 2024 – Present

- Created investment memos, pitch decks, conducted deal screens, created and developed pro forma financial models, pitched to the investment committee and managing partners weekly to underwrite deals across Technology, Consumer & Retail and Healthcare sectors

Selected Transaction Experience:

- OpenAI – \$6.6B Funding Round at \$157B Valuation
 - Assessed historical trends, KPIs, and revenue streams to showcase the company's rapid growth across diverse revenue segments
 - Built a pro forma financial model using key revenue drivers such as regular customers, enterprise customers and API revenues

Dinan Capital Advisors | Boutique Middle Market Investment Bank

Phoenix, AZ

Investment Banking Summer Analyst - Generalist

Jun 2024 – Aug 2024

- Performed in-depth comparable company analysis and precedent transactions analysis to determine enterprise value and trailing twelve months (TTM) EBITDA multiples for various healthcare sector transactions and companies, enhancing valuation accuracy for seniors
- Assisted in preparing materials for one teaser, two pitchbooks, and two Confidential Information Memorandums showcasing client companies, outlining investment merits, valuation, growth opportunities, financial performance, and strategic advantage to attract buyers
- Completed comprehensive industry and market research to identify potential international and domestic opportunities for private equity group buyers and strategic buyers, significantly enhancing the accuracy and relevance of target lists for client acquisitions and partnerships
- Aided in the production of quarterly reports for Healthcare, Residential Services, Aerospace & Defense, Technology & Software, and Data Centers sectors, incorporating updated graphs, transaction data, and commentary to deliver comprehensive quarterly summaries

Platform Accounting Group | PE-Backed Consolidator of Independent CPA Firms

Salt Lake City, UT

Corporate Development Intern

May 2023 – May 2024

- Developed over 15 dynamic financial forecast models to assess metrics such as pro forma EBITDA and free cash flow for potential acquisition targets while collaborating closely with the deal team and working under the Director of Corporate Development and Finance
- Conducted thorough analyses of potential accounting boutique acquisitions and updated comparable company profiles, assessing relevant factors including; company size, leverage ratios, investment theses, and merger timelines within the accounting services industry
- Drafted non-disclosure agreements tailored to the acquisition of accounting boutiques, ensuring the confidentiality of client information
- Sourced potential acquisition targets on ZoomInfo in various states and led the initial outreach to engage with the potential acquisitions

EPIC Ventures | \$150M AUM; Early-Stage Venture Capital Fund

Salt Lake City, UT

Junior Analyst

Aug 2023 – Jan 2024

- Sourced over 100 potential software companies in B2B SaaS, Security, EdTech, and FinTech sectors through extensive market research
- Engaged with over 10 C-suite executives, acquiring valuable insights into startups business operations, growth strategies and challenges

EXTRACURRICULARS

Team Mexico Men's National Ice Hockey Team

North America | Europe | Asia

Goaltender

Jan 2018 – Present

- Represented Mexico in five (IIHF) World Championships, awarded a silver medal in the 2017 U18 (D3A) World Junior Championship
- Competed in various countries which included Istanbul, Turkey; Madrid, Spain; Bratislava, Slovakia; Sofia, Bulgaria; Reykjavik, Iceland

University of Utah Division 1 Ice Hockey Team

Salt Lake City, UT

Goaltender

Jan 2023 – Present

- Contributed to the school's first Division one National Championship Tournament appearance taking place in St. Louis, Missouri, USA

SKILLS & INTERESTS

Skills: Excel (Intermediate); PowerPoint (Intermediate) | **Languages:** Spanish (Native – Reading, and Writing), French (Intermediate – Reading, and Writing) | **Interests:** Volunteering; House Music Concerts; Golf; Snowboarding; Cooking; Hiking; Yoga; Boating | **Programs:** Recalc Academy, Citi's D1 Athlete Development Program, Sixth Street's Early Insight Program, Develop with Deutsche Bank, Citi's Early Identification Program; IB Track, Wells Fargo Project First Gen, Barclays Rising Leaders Symposium, Evercore TURM Leadership Summit

McKENZIE E TOOMEY

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EDUCATION

University of Chicago – Chicago, IL

GPA: 3.9/4.0

B.A. in Economics, Specialization in Business | B.A. in Chemistry | SAT: 1540

Anticipated Graduation: May 2027

- Trott Business Program: Selective, three-year program focused on building business acumen through weekly workshops and coursework at the Chicago Booth School of Business
- Relevant Courses: Principles of Microeconomics, Principles of Macroeconomics, Financial Accounting

International School – Bellevue, WA

GPA: 4.0/4.0 (unweighted)

Diploma

Graduation: June 2023

- Honors: Valedictorian (2023), National Merit Finalist and Scholar (2023), National Honor Society, Math National Honor Society, National French Honor Society, Science National Honor Society, AP Scholar with Distinction ('23 and '22)

PROFESSIONAL EXPERIENCE

University of Chicago – Research Assistant | Chicago, IL

01/2025 – Present

- Collected and synthesized economic, environmental, and human impact data to support the publication of a novel by Professor Raymond Lodato at the Harris School of Public Policy, based on prior performance in his Environmental Politics course

Orthopedic Physicians Association – Medical Assistant | Seattle, WA

06/2024 – 08/2024

- Assisted in clinic preparation and patient intake, including taking medical histories, measuring vitals, preparing patients for examinations, and preparing medications for injection
- Managed patient records, medical questions, and future appointments using the NextGen EHR system
- Acted as a “float” MA by adapting to the varying preferences of 9 physicians to effectively support each clinic

Sustainability Ambassadors – Climate Action Planning Intern, Bellevue Team Leader | Bellevue, WA

09/2022 – 09/2023

- Researched and developed 13 videos on green building, heat pumps, climate planning, and sustainable transport over the spring and summer of 2023, totaling 276 hours of work to promote youth awareness of sustainability
- Met virtually weekly with the Director of Learning to assess individual project progress and receive feedback
- Coordinated weekly team meetings for 8 team members and executed events such as “Bellevue Town Hall at School”, the Fall Kickoff, and the Bioregional Conference to engage stakeholders and promote sustainable action

LEADERSHIP & COMMUNITY DEVELOPMENT

UBS ‘Female Founders’ Case Competition – MAP Phase 2 Fellow; Scrum Master | Remote

02/2025 – Present

Selected Case Experience:

- Leading team of 6 women athletes introducing a new social impact initiative to UBS within a structured six-week timeframe (ongoing)
 - Selected by leadership to serve as Scrum Master, orchestrating 1-2 sprint planning meetings each week, effectively optimizing 5+ workstreams against a 6-week project deadline + implementing a burndown chart in AirTable to ensure we meet 100% of deadlines
 - Strategically assigning teammates to 5 critical sprints—planning, execution, control, monitoring, and closure—based on their unique skills/expertise, maximizing our efficiency while conducting a thorough workflow analysis to proactively identify/reduce bottlenecks
 - Actively managing the team’s sprint backlog, meticulously outlining deliverables for each sprint with ~10 tasks each, ensuring alignment across team + providing a clear visual representation of their role/s, empowering them to stay focused and productive
 - Submitting weekly “4L” sprint retrospectives, grounded in agile principles, to thoroughly analyze what the team [L]iked, [L]earned, [L]acked, and [L]onged for after each sprint, empowering and driving the entire team toward excellence and continuous improvement

University of Chicago Varsity Soccer – Team Member | Chicago, IL

08/2023 – Present

- Committed approximately 30 hours per week to training, meetings, film, travel, and competition while maintaining a full course load
- Started as Center-back freshman season, awarded All UAA 2nd Team, All-Conference 3rd Team, Team Defensive MVP (2023)

Women’s Athletic Association – Class Representative | Chicago, IL

09/2023 – Present

- Acted as the Women’s Soccer Team liaison at weekly meetings to organize field days, improve college engagement in women’s athletics, and to sell tickets for the “Slam Dunk” fundraiser for the benefit of local Special Olympics teams
- Nominated for the Edith Ballwebber Award for contribution to the athletic program through athletic performance, team leadership, initiative, improvement and contributions to the WAA (2023-24 season)

Phoenix Sustainability Initiative – Sustainability, Arts, and Science Team | Chicago, IL

03/2024 – Present

- Worked with a team of 9 students to integrate sustainable action onto campus through art and science projects like Earth Day Chalking, campus clean-ups, and composting awareness and integration
- Engaged with the Undergraduate Chemistry Laboratory Director and the Office of Sustainability at the University to adopt energy-conserving laboratory standards + educate undergraduates in chemistry courses on the intense energy usage of laboratories to encourage sustainable science

Delta Gamma – Member | Chicago, IL

01/2024 – Present

- Volunteered extensively with local Chicago charities like Service for Sight, and coordinated “Anchor Slam” help educate blind youth
- Upheld sorority values of inclusivity, equity, friendship, character, and social responsibility in interactions with other undergraduates

Associated Student Body – Executive Officer, Class Officer | Bellevue, WA

09/2016 – 06/2023

- Planned and executed 7 assemblies, 6 dances, several spirit weeks and events, and a food drive to raise funds and school pride
- Directed weekly meetings for 32 students, keeping detailed minutes to ensure the smooth function of the ASB
- Worked to promote student engagement in ongoing school activities for all 7 years of attendance, High School ASB Officer of the Year (2022)

OTHER SKILLS & INTERESTS

- Language: Proficient in French, received the Washington State Seal of Biliteracy (2023)
- Technology: Proficient in the Microsoft Suite (Excel, Powerpoint, Word), and the EHR Nextgen Software
- Interests: NYT daily games (18-second record on the Mini Crossword), sustainability, hiking, wakeboarding, sketching and water-coloring,

Meredith Holcomb

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EDUCATION

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
- 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

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

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

- **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

MICHELLE ZHAI

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EDUCATION

Columbia University – New York, NY

GPA: 4.0/4.0

B.A. in Financial Economics | SAT: 1460

Anticipated Graduation: May 2027

- Accomplishments: Division I Student-Athlete (Lacrosse); Chinese U20 Women's National Lacrosse Team, Led Team in Points Freshman Season, Nominated for Columbia Rookie of The Year, Lacrosse All-Academic, PASLA Student-Athlete of The Year
- Relevant Courses: Principles of Economics, Microeconomics, Calc III, Statistics, Psychology
- Industry Education by Spring 2024: 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

PROFESSIONAL EXPERIENCE

JMI Equity – Incoming Product & Technology Student Consultant | New York, NY (Remote)

July 2024

- Expected to deliver a transformation strategy to JMI outlining innovative ways to enhance the firm's artificial intelligence & cybersecurity capabilities, ultimately looking to help JMI & its portfolio companies gain a competitive advantage in times of rapid technological change

PASLA – Social Media Marketing Intern | Philadelphia/Remote

May 2024 – Present

- Implemented a strategic social media plan that increased engagement on 15 Instagram posts by over 2000%, significantly enhancing the organization's online presence and interaction with its community
- Generated compelling marketing content and delivered projects in a timely manner, ensuring alignment with the fast pace of events and deadlines, while maintaining high levels of audience engagement and satisfaction
- Collaborated with team members and superiors to develop and execute marketing strategies, enhancing overall efficiency and output, which contributed to the successful promotion of the nonprofit's mission and events

PA Pockets – Co-Founder | Philadelphia, PA

December 2020 – Present

- Founded PA Pockets, a non-profit organization that provides essential lacrosse equipment and support to underprivileged players in Philadelphia and New York City, fostering community engagement and sports participation
- Coordinated a donation drive for PA Pockets, securing equipment and services valued at over \$3000 to support underprivileged lacrosse players in Philadelphia and New York City
- Trained young lacrosse athlete at multiple community events and programs, providing access to necessary equipment, training, and mentorship opportunities, thereby enhancing their athletic development and opportunities

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – Summer Fellow '24 | Remote

June 2024 – Present

- Selected as 1 of 100 college athletes to participate in a fellowship designed to prepare under-resourced athletes for professional success
- Receive 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
- Collaborating with a team of 6 athletes to provide specific recommendations on how JMI Equity can execute new A.I. initiatives in 5 weeks
 - Technical Skills Acquired: [Agile Project Management](#) | [Scrum Methodology](#) | [Tuckman's 5 Stages of Group Development](#)

Columbia University Lacrosse – NCAA Division I Student-Athlete | New York, NY

August 2023 – Present

- Executed rigorous training schedules, dedicating 30+ hours weekly to practice, strength training, competitions, leading the team in points
- Implemented effective time management strategies to balance a demanding schedule of 30+ hours of weekly training with academic responsibilities, resulting in maintaining a 4.0+ GPA and peak athletic performance across all semesters
- Developed advanced lacrosse skills and strategies through consistent practice and competition against elite talent, resulting in improved individual performance and resilience under pressure

Methacton High School – Class Secretary | Collegeville PA

09/2019 – 05/2023

- Led the organization and execution of school-wide events as Class Secretary, ensuring smooth operations and high participation, which fostered a strong sense of community and school spirit among students and staff
- Facilitated effective communication between students and the school administration, resulting in improved collaboration on various projects and initiatives, and ensuring student voices were heard and considered in decision-making processes
- Coordinated the planning and execution of class activities and events, streamlining processes and enhancing the overall efficiency and success of these initiatives, which contributed to a more engaged and cohesive student body

Methacton Varsity Lacrosse – Captain of Varsity Lacrosse Team | Collegeville, PA

05/2023 – 05/2023

- Mentored team members as Captain of Varsity Lacrosse, fostering a supportive environment that enhanced overall team performance and unity, leading to a successful season with improved individual and collective achievements
- Developed and implemented effective game strategies, resulting in improved performance and competitive edge for the Varsity Lacrosse team, and leading the team to several key victories and a successful season
- Arranged and led practice sessions and team meetings, ensuring structured and productive training that enhanced players' skills and team coordination, contributing to a cohesive and competitive team dynamic

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Hiking, Thrifting, Designing Clothes
- Fun Fact: I know the first 100 digits of pi.

NICOLAS W. WEST

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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

NNAMDI M. UDEOGU

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EDUCATION

Princeton University – Princeton, NJ

September 2023 – May 2027

A.B. in Economics | Minors: Computer Science, Finance

- **Coursework:** Macroeconomics, Microeconomics, Calculus 1-3, Statistics and Data Analysis, Writing Seminar
- **Organizations:** University Student Government (*Class Secretary*), Princeton Nigerian Student Association (*President*), BlackGen Capital (*Head of Technology*), Princeton Black Men Association (*Co-President*), Tiger Consulting Club (*Member*)

Georgetown Preparatory School – North Bethesda, MD

August 2019 – May 2023

- **Coursework:** AP Economics, Applied Calculus
- **Organizations:** Black Students Association (*President*), African Diaspora Club (*President*), Best Buddies International (*Vice President*), Chess Club (*President*) Finance Club (*Treasurer*), Track Team (*Captain*), Football Team (*Captain*)

EXPERIENCE AND LEADERSHIP

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 to advise Warburg Pincus on the potential acquisition of a new HVAC company, completing ~20% of the project by leading the “monitoring phase” workflow requiring me to perform a detailed financial statement analysis
 - Performing due diligence by examining my team's income statement, balance sheet, and cashflow statement in under 1 week to uncover key insights on success probabilities in the HVAC industry + the ability to improve margins/growth potential for 5 years
 - Developing a historical pipeline analysis by refining + organizing raw data to highlight key trends/insights across the HVAC industry, consolidating information into a 2-page Word doc. to describe how Warburg can help our company and capitalize on these trends
- **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

MSix Capital Group – *Private Equity Intern* | Chicago, IL

July 2024 – August 2024

- Developed skills in financial analysis, due diligence, and valuation techniques, essential for assessing potential acquisition targets
- Gained additional experience in negotiation, value creation, and operational efficiency by working closely with entrepreneurs and investors throughout the acquisition process
- Worked on 4 software deals including 1 workforce management SaaS deal under LOI with \$10M ARR

VerAleo Capital Partners – *Fintech Intern* | Hybrid - Bethesda, MD

May 2024 – July 2024

- Developed an expertise in organizational technology, interpreting changing market trends, and navigating the development of automated processes to drive customer value at scale
- Assisted in developing an LLM-powered research tool designed to increase servicing capacity for VerAleo's complex tax consulting business
- Committed to servicing 200+ mid-market enterprises and SMBs across sectors

University Student Government – *Class Secretary* | Princeton, NJ

April 2024 – Present

- Spearheaded all programming for a class of 1,350 students while managing a budget of \$85,000
- Maintained relationships with administrators to communicate the needs of the student body to university leadership

BlackGen Capital – *Head of Technology* | Princeton, NJ

February 2024 – Present

- Led a team of 4 finance analysts to analyze market trends, evaluate investment opportunities, and make informed recommendations for portfolio management
- Engaged in the development and presentation of investment pitches, showcasing comprehensive financial analyses, risk assessments, and potential returns to club members and advisors

Homeboy Industries – *Immersion Trip* | Los Angeles, CA

June 2022 – July 2022

- Spent 30 days working to provide hope, training, and support to formerly gang-involved and previously incarcerated people, allowing them to redirect their lives and become contributing members of a community
- Expected to collaborate with a team to shop, package, and deliver food to displaced citizens on Skid Row and other extensively homeless neighborhoods in the Los Angeles area

ATHLETICS

Division 1 Football and Division 1 Track and Field – *Student Athlete* | Princeton, NJ

August 2023 – Present

- Commit 30+ hours a week to practice, tournaments, film sessions, individual/team meetings, travel, and community service
- Provide leadership that is inclusive, transparent, empowering, and supports the teams' goal to develop teammates on/off the field
- Develop a results-oriented focus and skills in critical thinking, accountability, resiliency, teamwork, and time management

ADDITIONAL INFORMATION

- **Languages:** Fluency in English, Igbo, West-African Pidgin, and Proficient Working Fluency in Spanish
- **Interests:** Fitness, Arts: Visual and Literary, Learning Languages, Cultural Travel
- **Additional Information:** Igbo is my first language; Nigeria National Under-20 Track & Field qualifier
- **Technical Skills:** Microsoft Suite, Hubspot

Owen Carlson

(323) 219-7690 | omc22@cornell.edu | www.linkedin.com/in/owen-m-carlson

EDUCATION

Cornell University, College of Arts & Sciences

B.A. in Economics | Minor in Business

Expected Graduation: May 2027

Ithaca, NY

- **GPA: 4.08**
- Honors: 2024 Ivy League Baseball Finalist, 2-time 400 Club (student-athletes with 4.0 GPA or above in a given term)
- Coursework: Finance, Financial Accounting, Intermediate Macroeconomics, Microeconomics, Calculus, Probability Models

Harvard-Westlake School

June 2023

Studio City, CA

- **GPA: 4.24**
- Honors: Honor Roll (4 years), 2nd Team Mission League, CIF Southern Section Champion, Spanish National Honor Society
- Activities: Baseball Team Captain, StoneCutters Art & Literary Magazine, Student Ambassador, Wells Fargo Externship

PROFESSIONAL EXPERIENCE

TJC (The Jordan Company)

June - July 2025

Incoming Summer Analyst, Private Equity

New York, NY

- Accepted offer at leading middle market private equity firm with \$31B+ AUM focused on North American businesses
- Generalist summer program, will collaborate with deal teams across healthcare, technology, consumer and industrials groups

Telos Advisors

June - July 2024

Investment Banking Summer Analyst, TMT

Santa Monica, CA

- Staffed on two live sell-side M&A deals in TMT sector, including leading AI-powered image and content creation platform
- Updated monthly cohort and LTV analyses, providing insights to firm's partner to frame company's story to potential buyers
- Maintained firm's precedent transactions, comparable companies, and buyer tracking files in Excel to streamline deal flow
- Developed two public information books and industry research report on collectibles market to evaluate prospective clients

Los Angeles Philharmonic, Hollywood Bowl

April - August 2023

Usher

Los Angeles, CA

- Collaborated with 10 team members and managers to resolve time-sensitive conflicts regarding entry, ticketing and seating
- Delivered customer service excellence and supported operational efficiency at largest outdoor amphitheater in Los Angeles

ACTIVITIES & LEADERSHIP EXPERIENCE

Cornell University Varsity Baseball

August 2023 - Present

Division I Athlete

Ithaca, NY

- Train to perform under pressure, receive feedback, collaborate with teammates, and balance practice, games and academics
- Compete in 30+ hours per week of team activities and develop effective leadership strategies to motivate teammates
- Earned 2024 Ivy League Baseball Tournament Finalist and awarded Ivy League Baseball Athletes of the Week Honor Roll

Warburg Pincus Case Competition

December 2024 - Present

Team Captain

Remote

- Executing comprehensive valuation analysis of new HVAC company aligning with Warburg's 2025 investment strategy
- Selected to lead small deal team, responsible for managing 5+ process workstreams, ultimately approving team's 3-statement model + presenting our final recommendation to senior leaders
- Organizing 2 team discussions per week to ensure compliance with deadlines, developing 2-page written project plan with SMART goals + schedule of tasks/milestones for all 5 workstreams, ultimately ensuring we deliver compelling presentation
- Applying the lessons learned from 20+ hours of accounting instruction on Wall Street Prep to oversee construction of model

Make A Play Foundation (MAP)

November 2024 - Present

Formula 1 & Diamond League Fellow

Remote

- Compete in three mock interviews against 100+ other college athletes to sharpen behavioral and technical interview skills
- Attend frequent virtual events with leading companies in finance to deepen understanding of industry standards of excellence

Cornell University Student-Athlete Advisory Committee

November 2024 - Present

Treasurer

Ithaca, NY

- Manage all finances and secure funding for Committee events and community service projects such as Bench For A Cause
- Represent 1,200+ student-athletes across 37 varsity teams, engage with team representatives and school to vote on initiatives

SKILLS & INTERESTS

- Skills & Languages: Microsoft Office, CapIQ, 451 Research, Spanish (moderate proficiency), ASL (elementary proficiency)
- Tae Kwon Do – First Degree Black Belt Certification and Volunteer Youth Martial Arts Instructor
- Interests: New York Yankees, Personal Investing, Ceramics, Piano, Classic Rock, Hiking, Travel, Fitness, L.A. Sports
- Other Experience: Founder of Kids Summer Camp, Banking at Cornell Club, Baseball Coach & Camp Counselor

Rachel Buhay

6154 Massive Peak Loop, Castle Rock, CO 80108

(720) 891-9044 | buhay@bc.edu

EDUCATION

Boston College – Morrissey College of Arts and Sciences

B.A. in Economics and Mathematics, Minor in Finance

Chestnut Hill, MA

Expected May 2027

- **GPA:** 3.71 / 4.00
- **Honors:** Thea Bowman Scholar, ACC Academic Honor Roll, P.E.O. Star Scholarship
- **Relevant Coursework:** Financial Accounting, Macroeconomics, Multivariable Calculus, Statistics

WORK & LEADERSHIP EXPERIENCE

Colorado Financial Advisors

Wealth Management Intern

Greenwood Village, CO

Jul 2024 – Aug 2024

- Built 20+ client investment portfolios (IRAs, ETFs), assessing risk tolerance based on retirement and savings goals; generated Monte Carlo simulations to help determine financial feasibility and recommend solutions
- Called ~15 perspective clients daily to build relationships, assess financial health and identify planning needs
- Assisted advisors by organizing client meetings, collecting financial paperwork and executing investments

Aprila Bank

Strategy Analyst Intern

Remote

Jul 2024 – Aug 2024

- Collaborated with teams across Western Europe to research the global SME-lending market, focused on the US and its competitive advantages by analyzing digital maturity and regulatory differences between states
- Produced a 40-page deck for company executives studying a potential entry into the U.S. market; recommended a phased market approach focusing on targeting sparse populations and rural areas

NCAA Division I Fencing Team

Women's Saber Division I Fencer, Student-Athlete Committee Representative

Chestnut Hill, MA

Aug 2023 – Present

- Devote 25+ hours a week to practice, strategy meetings, tournaments, tutoring and travel; serve as a liaison between players and administration to represent fencing on the Student-Athlete Advisory Committee
- Recognized for contributing to the highest NCAA women's team ranking in program history, a 7th place individual and 3rd place team finish at ACC Championships and a 67-35 individual win-loss season ratio

Boston College Philippine Society

Co-Public Relations Chair, Freshman Representative (Aug 2023 – Apr 2024)

Chestnut Hill, MA

Aug 2023 – Dec 2024

- Designed publicity materials to be advertised on social media, increasing year-to-date engagement by 54%
- Distributed weekly newsletters to 400+ subscribers to educate students on various opportunities and cultural events; led and properly allocated budget for annual talent show to optimize experience for ~150 attendees
- Committed 10-12 hours per week to assist in scheduling, documentation and mailing list management

Mile High Backpack Drive Club

Founder, President

Highlands Ranch, CO

Aug 2021 – Aug 2023

- Founded a multi-school non-profit club to donate 450+ backpacks to underprivileged children in the Philippines; coordinated international shipping initiatives alongside a team of 12 from \$2,000+ in donations
- Promoted fundraising awareness through 2 media outlets, social media campaign and original website

ACTIVITIES & INTERESTS

Activities: Investment Banking Association (Mentee), RBC Women's Advisory Program, Girls Who Invest OIP, Make-A-Play Foundation, History at The Catholic University of Portugal, 2022 USA Fencing U17 National Team
Interests: Self-Embroidered Sweatshirts, *The Princess Bride*, Pickleball, Intrinsic vs. Extrinsic Learning, Cafés

Reese M. DiBiase

reesediabiase@gmail.com | Knoxville, TN | (609) 781-1818 | www.linkedin.com/in/reesediabiase

EDUCATION

Stanford University - Stanford, CA

B.A. in Economics (Expected) | **GPA:** 4.0/4.0 Anticipated Graduation: **Jun 2027**

- Relevant Courses:** Accounting for Managers and Entrepreneurs, Introduction to Statistical Methods for Social Scientists, Principles of Economics, Economic Analysis I, Entrepreneurial Thought Leaders' Seminar, Savvy: Learning How to Communicate with Purpose
- Activities:** Scholars of Finance, Stanford Athletes in Finance, Stanford Women's Rowing, Social Events for Athletes
- Wall Street Oasis Education:** Investment Banking Interview Course, Excel Crash Course

Phillips Academy - Andover, MA | **GPA:** 4.0/4.0 (converted to 4.0 scale) **Sep 2019 – Jun 2023**

- Honors:** Cum Laude Society, Andover Business Club President, Andover Varsity Girls Rowing Captain

PROFESSIONAL EXPERIENCE

One Equity Partners - *Incoming Private Equity Analyst* | New York, NY **Jun 2025 – Aug 2025**

- Expected to conduct market research and corporate analysis to identify new business opportunities
- Expected to present industry insights and strategic recommendations in weekly meetings with senior leadership

Warburg Pincus Investment Banking Case Competition – MAP Participant | New York, NY (Virtual) **Dec 2024 – Present**

- 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 “monitoring phase” workstream requiring me to perform a financial statement analysis
- Performing due diligence by examining my team's income statement, balance sheet, and cashflow statement in under 1 week to uncover key insights on success probabilities in the HVAC industry + the ability to improve margins/growth potential
- Submitting a final pitchbook + single master document (CIM) summarizing the opportunity and equity impact of the proposed transaction, formally closing the project & transferring all materials/solutions to Warburg's Human Capital Team

Newport Capital Group - *Wealth Management Intern* | Red Bank, NJ **Jul 2024 – Aug 2024**

- Analyzed mutual fund performance and developed strategies to diversify client portfolios
- Collaborated on innovative startup concepts, supporting entrepreneurial projects for clients
- Delivered financial analysis and market research to guide investment decisions

Tristar Rowing Club - *Rowing Coach* | Alcoa, TN **Jun 2023 – Jul 2023**

- Mentored 50+ athletes through individualized coaching, fostering leadership and teamwork
- Increased coxswain performance by 300%, demonstrated by team evaluation results

EXTRACURRICULAR ACTIVITIES

Lime Connect – Member | Virtual **Aug 2024 – Present**

- Network with 22,000+ students and professionals with disabilities, promoting workplace inclusivity and equality
- Engage with industry leaders to enhance career growth and support diversity in business

Stanford Women in Finance – Member | Stanford, CA **Dec 2023 – Present**

- Collaborate with 50+ peers to enhance understanding of finance, investments, and career strategies
- Discuss technical concepts for finance recruitment, including Accounting, LBO, DCF, and Valuation

Stanford Women's Open-weight Rowing – Coxswain | Stanford, CA **Sep 2023 – Present**

- Communicate key race information, mirroring client-communication in fast-paced transactions
- Execute race strategy under pressure, parallel to managing time-sensitive financial projects
- Prioritize competing demands while managing 20+ hours of dual AM/PM practices weekly

Andover Business Club - *President* | Andover, MA **Feb 2021 – May 2023**

- Managed 25+ member club and increased Female Participation by over 200%
- Raised \$3,000 for local charities, including \$1,500 during tenure as president

SKILLS, INTERESTS, ACHIEVEMENTS & CERTIFICATES

Skills: First Aid and CPR Certified | Critical Thinking | Dedicated Team Player | Leadership | Adaptability | Detail-Oriented

Interests: Distance Running | Gender STEM Disparities | Creative Writing | Neurodivergent Minds | Women in Elite Athletics

Achievements:

- 2024 NCAA National Runner Up **Jun 2024**
- 2024 PAC12 Champion **May 2024**
- U19 USRowing 2022 Men's Selection Camp Invitee **Jun 2022 – Jul 2022**

Certificates:

JPMorgan Chase Career.edYOU Academy Graduate **Sep 2024 – Nov 2024**

- Completed all program courses to learn about the organization's structure, culture, and opportunities
- Developed professional skills and networked with recruitment and financial professionals

SAGE PIEKARSKI

[HTTPS://WWW.LINKEDIN.COM/IN/SAGE-PIEKARSKI/](https://www.linkedin.com/in/sage-piekarski/) • (224) 565-5596 • SAGEPIEKARSKI@COLLEGE.HARVARD.EDU

EDUCATION

Harvard University – Cambridge, MA

GPA: 3.8/4.0

B.A. in Economics & Government | Minor in French | SAT: 1510

Anticipated Graduation: May 2027

- Accomplishment: NCAA D1 Student Athlete – Field Hockey, Ivy League Rookie of the Year – Harvard Field Hockey, Academic All-Ivy, All Ivy First Team as a freshman, Ivy Offensive Player of the Week
- Relevant Courses: Principles of Microeconomics; Principles of Macroeconomics; Morality, Leadership, and Gray-Area Decisions; International Conflict and Cooperation, Meritocracy and its Critics
- Industry Education by Spring 2024: 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

PROFESSIONAL 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

Massachusetts Department of Conservation and Recreation – *Lifeguard* | Concord, MA

May 2023 – August 2023

- Supervised swimming activities at Walden Pond, enforcing policies, guidelines, and safety procedures to ensure patron safety
- Implemented government regulations to mitigate potential threats to human, wildlife, and ecosystem health
- Managed significant responsibility and safeguarded the lives of 500k+ visitors who frequent Walden Pond during the summer months

Model United Nations Club – *Board Member / CEO* | Deerfield, MA

August 2021 – May 2023

- Led weekly meetings to instruct and disseminate the principles of the Model United Nations program among fellow students
- Served as the club’s Chief Financial Officer, overseeing budgets for events and conferences
- Organized annual conference schedules, providing students with opportunities to participate in a variety of events nationwide

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – *Skills Challenge Fellow '24 (Spring Cohort)* | Remote

Spring 2024 – Present

- Selected as 1 of 100 college athletes to participate in a fellowship designed to prepare underrepresented athletes for professional success
- Receive 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
- Collaborating with a case team of 4 other athletes to develop an investment thesis for Morgan Stanley’s Fixed Income Division in 5 weeks
 - Technical Skills Acquired: Agile Project Management | Scrum Methodology | Tuckman’s 5 Stages of Group Development

Harvard University Varsity Field Hockey – *Student Athlete* | Cambridge, MA

August 2023 – Present

- Trained and competed at the Division I level, representing Harvard University in achieving significant milestones including Ivy League Championship, Ivy League Tournament Championship, and NCAA Elite Eight finish
- Maintained a demanding academic workload while dedicating over 26 hours per week to training and team commitments, resulting in recognition on the NFCA Division I National Academic Squad
- Played a pivotal role in the team’s success through hard work, consistency, dedication, and motivation, earning recognition as the Ivy League Rookie of the Year and receiving All-Ivy First Team Honors

Deerfield Academy Field Hockey – *Varsity Athlete & Captain* | Deerfield, MA

August 2021 – May 2023

- Cultivated a welcoming and collaborative team environment through regular team bonding events and weekly athlete check-ins, promoting peak performance and overall enjoyment
- Facilitated communication between athletes and coaches, ensuring a seamless transition to a new academic year’s team and aligning all parties with team expectations, weekly schedules, and shared goals
- Managed the team’s social media presence to increase fanbase engagement and garner support from peers, teachers, and staff, enhancing overall team visibility and camaraderie

Morgan’s Message – *Ambassador* | Cambridge, MA

September 2021 – Present

- Volunteered to advocate for student-athlete mental health awareness, aiming to reduce stigma, expand reach, and empower individuals who may be struggling in silence
- Organized monthly awareness meetings and community fundraising events to foster dialogue and spread knowledge about student-athlete mental health
- Contributed to the organization by donating a \$1,000 grant to support its development and advance its cause of promoting mental health awareness among student-athletes

Syrian Youth Empowerment Program – *Mentor* | Deerfield, MA

August 2021 – May 2023

- Conducted video calls with a young Iraqi female, providing guidance for her aspirations to study in America
- Facilitated English language learning through consistent conversations over a two-year period, enabling my mentee to achieve proficiency and qualify for education opportunities in America
- Supported my mentee in navigating college application preparations, addressing challenges related to international relocation and adjustment to life in America

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Athletics, travelling, surfing, painting, pottery.
- Fun Fact: I can solve a Rubik’s Cube in under 2 minutes.
- Biggest Sports Lesson: Don’t let outside factors impact your own self-esteem or happiness

SASHA MOTLAGH

[LINKEDIN PROFILE](#) • (469) 999-8855 • MOTLAGHS@SAS.UPENN.EDU

EDUCATION

University of Pennsylvania – Philadelphia, Pennsylvania

GPA: 3.8/4.0

B.A. in International Relations | Minor in Legal Studies and History | ACT: 33

Anticipated Graduation: May 2027

- Accomplishments: NCAA Division I Student-Athlete (Tennis), Ivy League Championship Runner-Up Team, Ambassador to the Women's Athletic Association, Penn Global Mosaic Student Representative, Team Ranked #61 Nationally
- Relevant Courses: International Business Ethics, History of American Law to 1877, International Political Economy, Business in the Global Political Environment, Law and Policy in International Business,
- Industry Education by Spring 2024: 5 Phases of Project Management; Agile Framework; Creating Business Presentations 101; Scrum

PROFESSIONAL EXPERIENCE

JMI Equity – *Incoming Product & Technology Student Consultant* | New York, NY (Remote)

July 2024

- Expected to deliver a transformation strategy to JMI outlining innovative ways to enhance the firm's artificial intelligence & cybersecurity capabilities, ultimately looking to help JMI & its portfolio companies gain a competitive advantage in times of rapid technological change

UPenn Women's Athletic Association – *Ambassador* | Philadelphia, PA

August 2023 – Present

- Chaired meetings with executives monthly to go over projects and plans for the association's goals and aspirations
- Facilitated communication between members of varsity athletic teams and the WAA executives regarding events, networking, fundraising, and empowerment projects
- Campaigned for the equality of varsity female athletes on campus and for more benefits for the whole varsity athletics community

Penn Tennis Camp – *Tennis Coach* | Philadelphia, PA

08/2023 – 08/2023

- Coached young tennis players technical, physical, and mental skills in combination with daily/weekly organization of program structure
- Assigned groups to players and split up coaches to optimize time and efficiency on court considering chemistry and level
- Cultivated passion and perseverance in young players with the goal of working hard and having fun while staying competitive

LEADERSHIP & COMMUNITY DEVELOPMENT

Make A Play Foundation (MAP) – Summer Fellow '24 | Remote

June 2024 – Present

- Selected as 1 of 100 college athletes to participate in a fellowship designed to prepare under-resourced athletes for professional success
- Receive 20+ hours of targeted interview preparation, professional development coaching & industry-specific training for competitive roles
- Collaborating with a team of 6 athletes to provide specific recommendations on how JMI Equity can execute new A.I. initiatives in 5 weeks
 - Technical Skills Acquired: Agile Project Management | Scrum Methodology | Tuckman's 5 Stages of Group Development

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

August 2023 – Present

- Enhanced my team's experience and efficiency with practice by bringing the equipment to the court before practice every day
- Managed communication between the team, Women's Athletic Association, and the Athletics department with bi-monthly updates on the association's activities as a representative
- Enhanced my team's experience and efficiency with practice by bringing the equipment to the court before practice every day
- Spent time guiding more than 12 recruits around campus and educating them about the process and experience of recruitment

University of Pennsylvania Global Mosaic Pre-Orientation Program – Program Leader | Philadelphia, PA

08/2023 – 08/2023

- Addressed intercultural dialogue, culturally conscious discussions, leadership skills, and transnational issues without implicit biases
- Planned a cultural presentation of 15 students blending cultural heritage and history to stimulate an analytical discussion
- Campaigned in a mock trial against faculty members to change policies in different jurisdictions with cultural consciousness

Women in Sports Club at the Greenhill School – Founder | Addison, TX

08/2022 – 05/2023

- Fostered confidence in a group of over 40 girls across the ages 13-18 to pursue athletics to a higher collegiate level
- Designed panels of discussions with collegiate and pre-professional athletes to build connection and accessibility to higher athletics
- Transformed mindsets with learnings from professional athletes which led to two members of the club to play different Division I sport, and many others rose to leadership roles in their varsity teams

NON-TECHNICAL SKILLS & INTERESTS

- Interests: Photography, Travel, Cooking, Digital Art
- Fun Fact: I love to spend my free time cooking with no recipe.
- Biggest Sports Lesson: The value of being present every day.

Shirley Bai

shirley.bai@emory.edu | (630) 881-7668 | [LinkedIn](#)

EDUCATION

Emory University, Goizueta Business School

Atlanta, GA

Bachelor of Business Administration, Finance & Accounting | Double Major: Psychology

May 2027

Cumulative GPA: 3.90/4.00 | Dean's List (Spring 2024)

Relevant Courses: Business Data & Decision Analytics, Corporate Finance, Business Communication, Financial Accounting

EXPERIENCES

Hunniwell Lake Ventures

Palo Alto, CA

Venture Capital Intern

May 2024 – Aug. 2024

- Analyzed 50+ medical device startups, reviewing 3 clinical trial designs, patent strategies, and FDA regulatory pathways
- Evaluated market size and assessed GTM strategy for a startup developing a novel needle-based tendon repair procedure
- Presented a 10+ slide investment recommendation in the preclinical, seed-stage orthopedic startup after meeting with CEO

Embark Partners

Boston, MA

Search Fund Intern

May 2024 – Aug. 2024

- Examined 600+ data entries on Ryzer's college camp churn to distinguish true churns and identify key trends and root causes
- Benchmarked macro trends against Ryzer's performance to identify comp-specific factors influencing growth and retention
- Investigated 200 coaching changes, identifying a 15% decrease in Ryzer's engagement and retention within affected programs

Zumiez

Bolingbrook, IL

Store Manager

Jun. 2021 – Aug. 2023

- Collaborated with lead regional manager to assess and optimize sales strategies, driving a 12% sales growth in two quarters
- Led 15+ sales associates, training in shelf life/design, productivity, and customer service, while monitoring store performance
- Supervised daily operations, overseeing cash flow and inventory to minimize discrepancies, reporting to regional manager

LEADERSHIP & ACTIVITIES

Goizueta Investment Management Group

Atlanta, GA

Equity Fund Analyst

Jan. 2024 – Present

- Manage 350k+ of Emory's endowment in public equities and bonds, focusing on risk-adjusted returns and long-term growth
- Analyzed company analysis, operating model, tailwinds, comparable firms, and assisted in building DCF to pitch AB InBev
- Attend weekly meetings focused on yield curves/interest rates, applying valuation methods to assess financial performance

Research & Investment Securities at Emory

Atlanta, GA

Lead Market Research Analyst

Sep. 2023 – Present

- Lead 4 analysts, delegating tasks for market segmentation, determining financial viability/optimal investment opportunity
- Oversaw telehealth sector analysis, identifying major regulatory challenges and transformative technologies shaping industry
- Gauged market competition by comparing 4 telehealth firms, focusing on market share, management, and financial health

Emory Varsity Track & Field

Atlanta, GA

Athlete (Long Jump & Hurdles)

Aug. 2023 – Present

- Spend 20+ hours weekly training, doing physical therapy, lifting, and competing in meets while maintaining full course load
- Travel nationally every weekend during indoor/outdoor season, competing against athletes from all divisions in long jump
- Co-founded the Emory Asian & Pacific Islander Student Athletes Association to enhance support network for Asian athletes

BobTutors

Naperville, IL

Volunteer ESL Tutor

Jul. 2020 – Jul. 2024

- Tutored 6 elementary ESL students, utilizing interactive learning techniques to boost engagement and vocabulary retention
- Integrated cultural lessons into language tutoring, enhancing students' cross-cultural understanding and communication skills

ADDITIONAL INFORMATION

Additional Activities: Alpha Kappa Psi Business Fraternity (VP Professional), Delta Delta Delta (Director of Lifetime Membership), Goizueta Women in Finance (Lead Undergraduate Representative), Fresh Prints (Campus Manager)

Honors & Awards: President's Volunteer Service Award (Gold), Gold Medalist in US Figure Skating Moves in the Field

Languages & Skills: Mandarin (Fluent), Spanish (Beginner), R Language (Beginner), Microsoft Suite (Beginner)

Interests: Travel (France, Japan), Music (Hozier, Lollapalooza), True Crime Podcasts (MrBalle), Formula 1 (Hamilton)

SOPHIE P. SLAYDEN

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

EDUCATION

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

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

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

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

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:** 2nd 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

Zada B. Sanger

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EDUCATION

University Of Pennsylvania | The Wharton School – Philadelphia, PA

GPA: 3.75/4.0

B.S. in Economics | ACT: 33 Graduation Year: 2027

- UPenn Division 1 Varsity Volleyball Player: 4x Ivy League Honor Roll, Led team with most kills in 2023 and 2024 season, 2nd in kills/set among all Ivy League players as a freshman
- Relevant Courses: Accounting, Managerial Economics, Corporate Finance, Strategic Cost Analysis, Business Statistics
- Wall Street Prep Education by 2025: Accounting Crash Course, Investment Banking Interview Guide & Soft Skills
- Affiliations: Delta Delta Delta Sorority, Wharton Women, Wharton Undergraduate Finance Club

PROFESSIONAL EXPERIENCE

Wasserman Group – *NFL Operations Intern* | Los Angeles, CA

June 2024 – August 2024

- Crafted pitch decks regarding agency representation and brand partnerships used in agents' meetings with clients.
- Conducted market research and outreach for potential talent which led to 3 player signings. Created a master document detailing how to comply with NIL/Agent representation laws for every state to streamline client recruitment process.
- Redlined client marketing and NIL contracts, became primary reviewer for my division.

BHS Multilingual Program – *Tutor* | Berkeley, CA

August 2022 – June 2023

- Assisted immigrant and refugee students with minimal English proficiency understanding and completion of their coursework through individualized instruction.
- Utilized creative approaches to determine and address academic areas of struggle for students as well as navigate linguistic and cultural barriers.
- Served as an advocate for students, expressing needs and progress to teachers and administrators.

Absolute Volleyball Club – *Coach* | Marin, CA

November 2021 – June 2023

- Led dynamic skill clinics for groups of up to 30 under resourced children ages 6-10.
- Adapted coaching strategies and drills to accommodate a range of skill levels and learning styles.

Jacket Newspaper – *Staff Writer* | Berkeley, CA

August 2021 – June 2023

- Wrote weekly articles which contributed to the vibrancy and relevance of school journalism. Work required interviews and data collection, analysis and interpretation.
- Enhanced my ability to meet strict deadlines, work collaboratively with a large team, conduct various kinds of research and distill complex information into concise and engaging narratives.

LEADERSHIP & COMMUNITY DEVELOPMENT

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 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.

Athletes In Finance Club – *Head of Marketing & Recruitment* | Philadelphia, PA

October 2024 – Present

- Helped found and grow club catered to building a community and network of Penn athletes with interests in financial services careers.

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.
- 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.

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

August 2023 – Present

- Attended bi-weekly workshops in course aimed at unlocking leadership potential for student athletes.

ADDITIONAL SKILLS

- Skills and Language(s): Spanish (Native Proficiency), Agile Project Management, Scrum Methodology,
- Interests: Omelet-Making, Track & Field High Jump, Skiing, Card Games, Hiking, Beach Volleyball