

Sophie Greenfield

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EDUCATION

University of Miami Herbert Business School

Coral Gables, Florida

Bachelor of Business Administration in Entrepreneurship and Finance

Expected May 2027

- **Honors:** Bermont/Carlin Scholar; Foote Fellow Honors Program; President's Honor Roll; President's Scholarship; The National Society of Leadership and Success; Alpha Lambda Delta
- **Relevant Coursework:** Fundamentals of Finance; Principles of Financial Accounting; Principles of Managerial Accounting; Business Analytics; Intermediate Financial Management; Investment and Security Markets; International Finance; Introduction to Private Equity and Venture Capital

WORK & LEADERSHIP EXPERIENCE

Jefferies

New York, New York

Incoming Investment Banking Summer Analyst

June 2026 - August 2026

Go Long For Luke

Boca Raton, Florida

Founder & CEO

September 2013 – Present

- Founded nonprofit 501(c)(3) organization, leading financial planning, budget management, and capital formation strategies that have raised over \$1.5M through large-scale fundraising efforts across multiple states, including flagship event at Mercedes-Benz Stadium in 2022
- Spearhead oversight and daily operations for forthcoming school for adults with autism (expected in 2027), managing \$200K resource allocation budget, tracking monthly expenses, analyzing 3 revenue streams, performing financial forecasting to achieve key profitability metrics for long-term financial growth

Alpha Kappa Psi Professional Business Fraternity – Beta Pi Chapter

Coral Gables, Florida

President

November 2025– Present

- Lead 277-member professional organization, setting strategic direction across career development, community engagement, and collaboration with national leadership while overseeing \$70K semester budget
- Launched first-ever career development platform “The Academy,” formalizing structured mentorship, cross-industry networking, and industry-specific workshop programming across 15+ industries

Treasurer

April 2025 – November 2025

- Oversaw \$100k+ in chapter finances for 170+ members, including fund allocation for events, processing reimbursements, and preparing financial reports while ensuring compliance with university guidelines
- Prepared, justified, and submitted SAFAC budgets and funding proposals for \$7k+ monthly budget and tracked all expenses, revenue, and sponsorship contributions to maintain accurate and up-to-date records

Fifth Avenue Financial

New York, New York

Wealth Management Summer Analyst

June 2025 – July 2025

- Reviewed client portfolios valued at \$1M+, rebalanced asset classes to align with investment policy statements, researched mutual funds, ETFs, alternative investments to support portfolio construction

Riverside Management Group

Westport, Connecticut

Summer Analyst

May 2024 – August 2024

- Developed DCFs, LBOs, and comparable analyses to evaluate purchase prices for \$5M+ investment opportunities, incorporating sensitivity analyses across 5 scenarios to strengthen valuation accuracy
- Conducted risk assessments and modeled 3 FCF scenarios, analyzing revenue growth, margin shifts, and capital expenditures to support data-driven investment strategies that improved ROI by 3%

Ghostzapper Inc.

New York, New York

Summer Analyst

May 2023 – August 2023

- Analyzed 8 early-stage technology companies by building financial models, performing market research, executing valuation analyses, and presenting data-driven recommendations that influenced \$1M in potential investment decisions

SKILLS, ACTIVITIES & INTERESTS

Technical Skills: Proficient in Microsoft Excel; PowerPoint

Certifications: Wall Street Prep Financial Statement Modeling, DCF Modeling; Bloomberg Market Concepts

Activities: Management 100 Executive Team Leader; Professional Development Student Leader; Herbert Business School Ambassador; TargetCanes Finance Mentorship Program

Interests: NFL RedZone; BBQ; The Big Bang Theory; Live Music; Traveling; Golf; Blackjack