

JANE DOE

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EDUCATION

Public University, Bachelor of Science in Finance Expected May 2027
GPA: 3.86/4.00; Honors Program; selected coursework: Corporate Finance, Accounting, Valuation, Statistics
Finance Society Investment Fund Analyst; built weekly pitch memos covering public equities and industry catalysts

WORK & LEADERSHIP EXPERIENCE

Middle-Market Advisory Firm Jun 2025 - Aug 2025
Investment Banking Summer Analyst

- Built DCF, comparable company, and precedent transaction analyses for a sell-side healthcare services pitch, triangulating valuation range across 18 public comps and 12 precedent deals.
- Drafted buyer universe of 90 strategic and sponsor targets by segment, acquisition history, and estimated check size, helping the team prioritize 24 outreach targets.
- Reconciled revenue, EBITDA, working capital, and customer concentration schedules from a confidential information memorandum to identify diligence questions before management calls.
- Formatted pitch-book pages, football-field output, and operating KPI tables under associate review, incorporating markups quickly while preserving source-link accuracy.

Student Investment Fund Sep 2024 - Present
Consumer Sector Analyst

- Pitched a long equity recommendation after analyzing unit economics, same-store sales, margin bridge, and management guidance; recommendation was approved for a 4% portfolio position.
- Created a quarterly earnings tracker comparing consensus estimates, reported results, and valuation movement across 14 consumer companies.
- Led training session for 12 new analysts on comparable company selection, revenue build assumptions, and investment memo structure.

Search Fund Project Jan 2025 - Apr 2025
Acquisition Diligence Analyst

- Screened 120 founder-owned software and services companies by revenue quality, customer concentration, churn, and owner succession risk.
- Built three-statement operating model with downside case, debt capacity, and working-capital assumptions for a board-style investment memo.

Finance Society Sep 2024 - Present
Mentorship Chair

- Matched 36 underclass students with upperclass finance mentors and organized weekly technical prep covering accounting, valuation, and market discussion.

SKILLS

Finance: DCF valuation, comparable companies, precedent transactions, LBO fundamentals, accounting, market research

Tools: Excel, PowerPoint, Capital IQ-style screening, data tables, sensitivity analysis, pitch book formatting

Additional: Spanish professional working proficiency; marathon training; community tutoring