

MANAGEMENT CONSULTANT

Skills

Microsoft Office Suite Factset Ipreo

Experience

07/2013 to 12/2014

Management Consultant Company Name i/4 City , State

- Utilized management abilities and knowledge of coding to oversee a team of 10 software engineers tasked with designing a back office database for a multi-billion dollar client Managed cross-functional teams in a high demand environment to complete a global strategy project under strenuous deadlines Drafted proposals for client engagements highlighting the expectations of service, engagement pricing and associated costs Evaluated CCAR vendor models and developed proprietary probability of default models for a multi-billion dollar mortgage portfolio Created valuation models designed to value both public and private equity for tax reporting purposes.

11/2010 to 02/2011

Investment Banking Analyst Company Name i/4 City , State

- Assisted lead associate and vice president in facilitating merger and acquisition transactions in the life science industry by reviewing and analyzing pro forma financial statements and updating models accordingly Created processes around the sales cycle to monitor and improve sales performance while keeping a more precise account of prior prospecting efforts Maintained the CRM system and streamlined its use through extensive, voluntary training making the team more efficient and impactful.

11/2008 to 11/2010

Financial Advisor Company Name i/4 City , State

- Evaluated the financial plans of current and prospective clients and provided recommendations that would reasonably ensure they meet their future financial goals Assembled a team of estate planners, investment specialists and CPAs providing a comprehensive planning board for clientele.

Company Name i/4 City , State

- Institutional Equity Sales Dec 2014 - Present Utilized strong written and verbal communication skills to distill complex financial topics into salient points for clientele Evaluated research reports and valuation models to gain a holistic understanding of the research product Developed an interactive, online database through R programming to hold 13F and trade data which eliminated redundancies in the desk's daily processes Collaborated across multiple segments of the firm including research, syndicate, corporate access and derivatives personnel Managed multiple client requests in a fast pace environment by staying organized and keeping detailed accounts of tasks.

Education and Training

May 2013

MBA CARNEGIE MELLON UNIVERSITY, TEPPER SCHOOL OF BUSINESS i/4 City , State

Investment Strategy

Dec 2009

B.S : Finance Finance Bright Futures Scholar National Honor Society

Interests

Graduate Finance Association, Alpha Club, The Soccer Club UNIVERSITY OF SOUTH FLORIDA Tampa, FL

Skills

CRM, clientele, client, clients, database, Dec, derivatives, designing, Equity, fast, financial, financial statements, functional, Investment Strategy, access, Microsoft Office Suite, office, personnel, pricing, processes, research product, coding, Programming, proposals, reporting, research, research reports, Sales, strategy, tax, valuation, verbal communication skills, written

Additional Information

- Clubs: Graduate Finance Association, Alpha Club, The Soccer Club UNIVERSITY OF SOUTH FLORIDA Tampa, FL
- CREDENTIALS AND LICENSES Chartered Financial Analyst Series 7 Series 63 INTERESTS Languages History Futbol Markets Golf