

FINANCIAL ANALYST

Highlights

Microsoft Excel and PowerPoint (intermediate), Capital IQ (intermediate), FactSet (intermediate), SNL (intermediate), Bloomberg (beginner/intermediate), SPSS (intermediate)

Experience

Company Name July 2015 to Current Financial Analyst

City, State

- Support CEO and corporate operating committee directly by shaping and implementing AIG's strategy on a global level Initiate, evaluate and execute M&A deals and innovation investments in order to enable AIG's inorganic growth Selected Transaction Experience and Strategic Projects: 500 Million Divestiture Work with senior management to identify ~\$208 million of allocated versus direct expenses in order to make normalizing adjustments to pretax operating income (PTOI) and drive up valuation price of divested entity Craft marketing language and organize flow of confidential information memorandum in order to prepare company leadership for management discussions with potential buyers Manage virtual data room, track buyer due diligence questions and assist in all steps of running the divestiture process Joint Venture Merger to Expand Commercial Business by ~\$200 Million Analyze portfolio of joint venture partner in order to compare net premiums written of AIG's book of business to partner's Strategize with senior management to produce non-binding first round presentation in order to engage partner in equal and active ownership of the joint entity 20 Million Investment in Biotechnology Company Research business models, products, customers, technology and existing market share of private company and over 10 competitors in order to evaluate strategic rationale for investment Write memo detailing industry dynamics, analysis of peer strengths versus weaknesses and investment recommendation Selection of AIG Peers Build database of financial metrics including market capitalization, total revenues and assets, segment (property and casualty versus life and retirement) revenues and assets from 70 companies in order to formulate a peer list and competitor set for AIG Create presentation summarizing peer selection methodology to be delivered to corporate operating committee in order to determine 2015 long-term incentive plans for AIG.

Company Name June 2014 to August 2014 Investment Banking Summer Analyst

City, State

- Supported Industrials Coverage Group by building client presentations, evaluating and compiling financial metrics and aiding in model analysis and valuation Selected Transaction Experience and Strategic Projects: Transportation Company's ~\$6 Billion Initial Public Offering Compared management and board structure in 9 peer filings in order to help senior leadership in the drafting of the prospectus and road show materials 170 million Buy-Side M&A Compiled 8 years of titanium price and production data in order to project summary financials and aid private equity buyer in determining valuation price of the target company 100 million Strategic Planning Analysis Identified over \$100 million in fees for senior management's evaluation of deal pipeline and future budgeting Pitches and Client Presentations Built over 50 acquisition target profiles in order to help group pitch M&A opportunities to 5 different clients.

Company Name September 2013 to December 2014 Co-President

City, State

- Taught 30 undergraduates stock market fundamentals and socially responsible investing in order to increase financial literacy Â· Evaluated public companies by analyzing strategy and operations, examining financial statements and performing valuation Â· Invested \$1,000 of fundraised money in selected microfinance businesses, B corps, or charities to support social impact.
- Bloomberg Analytics Boot Camp (500+ applied; 24 selected), New York, NY, Participant May 2013 Â· Trained for one week in Analytics and Sales to gain exposure to equities, fixed income and commodities Â· Operated Bloomberg Terminal to obtain data for 10 stock pitches, technical analyses of securities and industry overviews.

Education

Yale University May 2015 Diploma City, State

Bachelor of Science : Economics and Psychology GPA: 3.75/4.0 GPA: 3.77 GPA: 3.89 Economics and Psychology GPA: 3.75/4.0 GPA: 3.77 GPA: 3.89 2nd Place/40 students: Corporate Ethics, Yale-China Association Symposium on Global Strategic Leadership Â· Relevant Coursework: Strategic Management, Accounting & Valuation Â· Cumulative SAT score: 2390 (Math: 800; Verbal: 790; Writing: 800), Cumulative GMAT score: 770

Languages

Mandarin Chinese (native fluency), Spanish (conversational proficiency)

Interests

Traveling, piano, violin, table tennis, swimming, volunteering, pistachio ice cream, Yelp

Additional Information

- Interests: Traveling, piano, violin, table tennis, swimming, volunteering, pistachio ice cream, Yelp

Skills

Accounting, Biotechnology, Bloomberg, book, budgeting, commodities, Client, clients, database, drafting, due diligence, equities, equity, senior management, financials, financial, financial statements, fixed income, innovation, investments, IQ, Leadership, Mandarin Chinese, marketing, market, materials, Math, Microsoft Excel, money, PowerPoint, Presentations, Research, Sales, SAT, securities, Spanish, SPSS, strategy, Strategic, Strategic Management, Strategic Planning, Symposium, Transportation, Valuation, written