

SARAH CHEN

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Email: sarah.chen@email.com

EDUCATION

Harvard University, Cambridge, MA Bachelor of Arts in Economics Expected May 2026

- GPA: 3.9/4.0; SAT: 1520; Dean's List all semesters
- Honors: Magna Cum Laude candidate, Phi Beta Kappa Society
- Relevant Coursework: Financial Economics, Corporate Finance, Econometrics, Statistics

WORK & LEADERSHIP EXPERIENCE

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|---|---|
| <input type="checkbox"/> March 2024
MA Spring Insight Program Participant
J.P. Morgan Chase Boston | Participated in 3 day intensive program covering M&A modeling and pitch presentations.
Collaborated with team of 8 students on live case study for \$2.3B retail acquisition.
Presented investment recommendations to senior managing directors. |
| <input type="checkbox"/> June 2023 to August 2023
Finance Intern, Wealth Management
State Street Corporation Boston, MA | Analyzed portfolio performance for 15+ high net worth clients with \$50M+ AUM.
Built Excel models to track asset allocation and risk metrics across equity portfolios.
Prepared quarterly performance reports presented to client relationship managers |
| <input type="checkbox"/> 2 September 2023 to Present
MA Analyst | Conduct equity research on technology sector companies with market caps \$1B+
Built DCF and comparable company models for 12+ stock pitch presentations
Generated investment thesis resulting in 18% paper portfolio returns over 6 months |

SKILLS

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|--|---|
| <input type="checkbox"/> Languages
Fluent in Mandarin
; Conversational proficiency in Spanish | <input type="checkbox"/> Technical
Advanced Excel modeling, Python, R,
Bloomberg Terminal Certifications: Bloomberg
Market Concepts (BMC) Certificate |
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ACTIVITIES

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| <input type="checkbox"/> Harvard Debate Team | <input type="checkbox"/> Volunteer Income Tax Assistance Program |
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INTERESTS

- | | |
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| <input type="checkbox"/> Options trading simulation | <input type="checkbox"/> Behavioral economics research |
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DAVID THOMPSON

200 Park Avenue, New York, NY 10166

Phone: (646) 555-2847

Email: alexandra.martinez@email.com

EDUCATION

Columbia Business School, New York, NY Master of Business Administration May 2015

- GPA: 3.7/4.0; GMAT: 730; Finance concentration
- Leadership: Finance & Economics Club Vice President

University of Pennsylvania, Philadelphia, PA Bachelor of Science in Finance May 2012

- GPA: 3.6/4.0; Magna Cum Laude; Dean's List 6 semesters
- Relevant Coursework: Corporate Finance, Investment Analysis, Financial Modeling

WORK EXPERIENCE

Goldman Sachs, New York, NY Vice President, Investment Banking Division - Healthcare

Jan 2020 - Present

- Led execution of \$12B+ in M&A and capital markets transactions across pharmaceutical, biotech, and medical device sectors
- \$3.2B Pharmaceutical Merger - Managed cross-border transaction team of 8 analysts and associates, coordinated regulatory approvals across 4 jurisdictions
- \$1.8B Biotech IPO - Developed comprehensive equity research and valuation models, led roadshow presentations to 50+ institutional investors
- \$2.1B Medical Device Acquisition - Structured complex deal financing including \$800M debt component and \$1.3B equity consideration
- Generated \$45M+ in fee revenue across 15+ transactions, ranking top 10% in coverage group

JPMorgan Chase, New York, NY Associate, Investment Banking Division - Technology

Aug 2017 - Dec 2019

- Executed \$8B+ in technology sector M&A transactions and capital raises across software, hardware, and fintech verticals
- \$2.5B Software Company Sale - Built detailed DCF and LBO models, managed due diligence process with 3 strategic acquirers
- \$900M Fintech Series D Funding - Led financial modeling and investor presentation development for late-stage growth financing
- \$1.4B Hardware Manufacturer IPO - Coordinated with legal counsel and auditors on S-1 preparation and SEC comment responses
- Mentored 6 junior analysts on financial modeling techniques and client presentation skills

SKILLS, ACTIVITIES & INTERESTS

Languages: Fluent in French

Technical Skills: Expert-level Excel/VBA modeling, PowerPoint, Bloomberg Terminal, Capital IQ, FactSet, Refinitiv

Certifications: CFA Charterholder (2018), Series 79 & 63 licenses

Activities: Columbia Alumni Investment Banking Network Board Member

Interests: Quantitative finance research, European equity markets, competitive cycling, wine collection

MICHAEL RODRIGUEZ

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Email: m.rodriguez@wharton.upenn.edu

EDUCATION

University of Pennsylvania, The Wharton School Philadelphia, PA

Master of Business Administration

Expected May 2025

- GPA: 3.7/4.0; GMAT: 740; Finance concentration
- Leadership: Investment Banking Club President, Private Equity Association VP

Georgetown University Washington, DC Bachelor of Science in

Finance May 2020

- GPA: 3.6/4.0; Graduated Cum Laude

WORK & LEADERSHIP EXPERIENCE

Investment Banking Summer Associate, Morgan Stanley New York June 2024 - Aug 2024

- Executed M&A transactions totaling \$4.2B across pharmaceutical and biotech sectors
- Biotech Company's \$1.8B Strategic Sale - Led financial due diligence and created thorough merger model supporting valuation
- Pharmaceutical Giant's \$900M Acquisition - Analyzed synergies and built accretion/dilution analysis for board presentation
- Medical Device Company's \$1.5B IPO - Developed pitch materials and coordinated with legal teams on SEC filings

Senior Consultant, Strategy & Operations , Deloitte Consulting Aug 2020 - June 2023

- Led cross functional teams of 6 to 10 consultants on digital transformation projects for Fortune 500 clients.
- Managed \$15M+ budget for healthcare system optimization reducing costs by 23%.
- Developed business cases and financial models supporting \$50M+ technology investments.

President, Wharton Investment Banking Club Philadelphia Sept 2023 - Present

- Manage organization with 150+ members and \$25K annual budget
- Organized networking events with 300+ attendees and 40+ investment banking professionals
- Established corporate partnerships with 8 bulge bracket and middle market firms

SKILLS, ACTIVITIES & INTERESTS

- Languages: Native Spanish; Intermediate Portuguese
- Technical Skills: Advanced Excel/VBA, PowerPoint, Tableau, SQL, Capital IQ
- Certifications: CFA Level II Candidate (June 2025 exam)
- Activities: Wharton Soccer Club (Captain), Habitat for Humanity volunteer
- Interests: Fintech innovation, emerging markets research, marathon running

JENNIFER PARK

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EDUCATION

University of Chicago Booth School of Business Chicago, IL

Certificate in Corporate Finance December 2024

Intensive 6-month program covering M&A, LBO modeling, and valuation techniques

Northwestern University Evanston, IL

Bachelor of Science in Engineering May 2018

GPA: 3.5/4.0; Industrial Engineering major with Economics minor

WORK & LEADERSHIP EXPERIENCE

McKinsey & Company Chicago,

IL Senior Business Analyst, Financial Services

Oct 2021 - Dec 2023

- Led due diligence workstreams for private equity clients on \$800M+ acquisition targets
- Built thorough financial models and market analyses for 25+ deal evaluations
- Technology Services Company DD - Created detailed revenue forecasting model and competitive analysis supporting \$650M acquisition by PE sponsor.
- Analyzed standalone financials and operational synergies for \$400M divestiture transaction
- Industrial Manufacturing Buy side DD - Evaluated market positioning and growth strategies for \$300M add on acquisition

Accenture Strategy Chicago,

IL Strategy Consultant

Sept 2018 - Oct 2021

- Executed strategic initiatives for Fortune 100 clients across technology and healthcare sectors
- Developed business transformation roadmaps resulting in \$40M+ annual cost savings
- Built financial business cases and ROI analyses for C suite executive presentations

Chicago Finance Professionals Association Chicago,

Jan 2024 - Present

IL Board Member

- Executed strategic initiatives for Fortune 100 clients across technology and healthcare sectors
- Developed business transformation roadmaps resulting in \$40M+ annual cost savings
- Built financial business cases and ROI analyses for C suite executive presentations

SKILLS, ACTIVITIES & INTERESTS

Languages: Fluent in Korean; Basic proficiency in Japanese

Technical Skills: Advanced Excel/VBA, PowerPoint, Alteryx, Tableau, FactSet

Certifications: CFA Level I passed (December 2023), FRM Part I Candidate

Activities: Chicago Marathon finisher (2022, 2023), Big Brothers Big Sisters mentor

Interests: Private equity research, quantitative finance, competitive cycling

ALEXANDRA MARTINEZ

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Phone: (646) 555-2847

Email: alexandra.martinez@email.com

EDUCATION

Harvard Law School, Cambridge, MA Juris Doctor May 2024

- GPA: 3.8/4.0; Harvard Law Review Staff Member
- Relevant Coursework: Corporate Law, Securities Regulation, Mergers & Acquisitions Law

Stanford University, Stanford, CA Bachelor of Arts in Economics May 2021

- GPA: 3.9/4.0; Phi Beta Kappa; Graduated Summa Cum Laude
- Honors: Golden Key International Honour Society, Economics Departmental Honors

WORK EXPERIENCE

Sullivan & Cromwell LLP, New York, NY Summer Associate, Corporate Department

June 2023 - Aug 2023

- Supported M&A transactions totaling \$6.5B across technology and healthcare sectors
- \$2.8B Technology Acquisition - Drafted purchase agreements and conducted legal due diligence for cross-border transaction
- \$1.9B Healthcare Merger - Analyzed regulatory compliance issues and prepared Hart-Scott-Rodino filing documentation
- \$1.8B Private Equity Buyout - Reviewed debt financing agreements and coordinated with credit rating agencies

Blackstone Group, New York, NY Corporate Development Intern, Real Estate Division

June 2022 - Aug 2022

- Analyzed investment opportunities in commercial real estate portfolio worth \$4.2B across 12 major metropolitan markets
- Built financial models for 8 potential acquisitions using DCF and comparable sales methodologies
- Prepared investment committee presentations for \$850M office building acquisition in Manhattan
- Conducted market research on retail property trends resulting in \$300M shopping center divestiture recommendation

SKILLS, ACTIVITIES & INTERESTS

Languages: Native Spanish; Advanced proficiency in Portuguese

Technical Skills: Advanced Excel modeling, PowerPoint, LexisNexis, Westlaw, Bloomberg

Certifications: Series 7 & 63 (in progress), Chartered Financial Analyst Level I Candidate

Activities: Harvard Business Law Review Editor, Stanford Mock Trial Team Captain (2019-2021)

Interests: International capital markets, regulatory compliance, professional tennis, art collecting

KATE MELANIE

123-456-7890

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123 Anywhere St., Any City

reallygreatsite.com

EXPERIENCE

INVESTMENT BANKING ANALYST

Morgan Stanley, San Francisco, CA

July 2024 - Present

- Supporting execution of \$7.2B+ in technology sector M&A and capital markets transactions
- \$2.6B Software Company IPO - Built comprehensive financial models and conducted comparable company analysis for cloud computing vertical
- \$1.8B Semiconductor Acquisition - Developed detailed synergy models and managed technical due diligence process with engineering teams
- \$2.8B Venture Capital-backed Growth Financing - Created pitch materials and coordinated investor outreach for late-stage funding round

PRODUCT STRATEGY INTERN

Google, Mountain View, CA

June 2023 - Aug 2023

- Analyzed competitive positioning for enterprise software products generating \$12B+ in annual revenue
- Built financial models projecting 5-year revenue growth across 15+ cloud service product lines
- Developed go-to-market strategy for new AI/ML platform resulting in \$200M+ projected first-year revenue
- Presented strategic recommendations to executive leadership team including VP-level stakeholders

SOFTWARE ENGINEERING INTERN

Facebook (Meta), Menlo Park, CA

June 2022 - Aug 2022

- Developed automated trading algorithms for corporate treasury operations managing \$50B+ in cash equivalents
- Built risk management dashboard tracking foreign exchange exposure across 25+ international markets
- Implemented machine learning models improving financial forecasting accuracy by 23% for quarterly planning cycles
- Collaborated with quantitative finance team on derivatives pricing models for equity compensation programs

EDUCATION

University of California,
Haas School of Business, Berkeley, CA
Master of Financial Engineering

May 2024

- GPA: 3.9/4.0; Graduate Research Fellowship Recipient
- Relevant Coursework: Quantitative Finance, Derivatives Modeling, Risk Management

Massachusetts Institute of Technology,
Cambridge, MA
Bachelor of Science in Computer Science

May 2022

- GPA: 3.8/4.0; Tau Beta Pi Engineering Honor Society
- Minor: Applied Mathematics; Senior Thesis: "Machine Learning Applications in High-Frequency Trading"

SKILLS, ACTIVITIES & INTERESTS

Skills/Certifications

- Python
- R
- SQL
- MATLAB
- Advanced Excel/VBA
- PowerPoint
- Financial Risk Manager (FRM) Level I

Activities

- Berkeley Women in Finance President,
- MIT Entrepreneurship Club Executive Board

Interests

- Quantitative trading strategies
- Cryptocurrency markets,
- Classical piano