[redacted]

New York, NY | [redacted] | [redacted] | [redacted]

PROFESSIONAL EXPERIENCE

Summit Strategy Partners New York, NY
Strategy Consultant July 2024 - Present

- Supported commercial due diligence for a sponsor evaluating a B2B software business at approximately $600 million enterprise value; assessed retention, customer concentration and evidence supporting the revenue plan.
- Analyzed customer- and product-level revenue in Excel and synthesized 18 customer interviews to distinguish recurring demand from potential churn risks.
- Compared management's forecast with historical results and customer feedback, documenting assumptions and downside questions for project-manager review.
- Prepared diligence exhibits on market position and customer risk for the project team's client presentation, incorporating project-manager feedback.
- Assessed 8 regional markets for a 2025 industrial-services growth strategy, combining market research with sales-team interviews to evaluate expansion opportunities.

Meridian Consumer Products Stamford, CT
Corporate Strategy Intern June 2023 - August 2023

- Compared competitor pricing and distribution models using public information; organized findings by customer segment for the corporate strategy team.
- Updated the market-sizing workbook and converted supporting research into exhibits for business-unit leadership.

EDUCATION

Fordham University Bronx, NY
B.S. Finance May 2024
GPA: 3.67 / 4.00 | Coursework: Valuation, Financial Statement Analysis, Corporate Finance, Business Statistics.

Activities: Finance Society; peer tutor in introductory finance.

INDEPENDENT MODELING PROJECT

Services-company LBO practice case
Independent modeling project 2026

- Built a 5-year LBO model for a fictional services company with a debt schedule and cash sweep; tested sponsor-return sensitivity to operating performance and exit assumptions.

ADDITIONAL INFORMATION

Skills: Excel, PowerPoint, commercial due diligence, customer analysis, market research and financial statement analysis; LBO modeling through independent practice.

Interests: Tennis, restaurant history and urban cycling.