[redacted]

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

SUMMARY

Strategy consultant looking to move into private equity. Experience working with clients on commercial due diligence, market research, growth opportunities and presentation development. Comfortable managing workstreams, analyzing data in Excel and communicating recommendations.

EXPERIENCE

Summit Strategy Partners New York, NY

Strategy Consultant July 2024 - Present

- Worked on commercial due diligence for a sponsor evaluating a B2B software business at an approximately $600 million enterprise value.
- Analyzed customer retention and churn data, summarized notes from 18 customer interviews and helped prepare the market assessment.
- Built Excel analyses of revenue by customer and product. Compared management's forecast with historical performance and customer feedback.
- Prepared slides about the target's market position, customer concentration and growth risks, and presented analysis to the project manager.
- Supported an industrial-services growth strategy in 2025, including an assessment of 8 regional markets and interviews with the client's sales team.

Meridian Consumer Products Stamford, CT

Corporate Strategy Intern June 2023 - August 2023

- Researched competitors and customer segments for the strategy team. Built a comparison of pricing and distribution models using public information.
- Updated a market-sizing workbook and helped prepare a presentation for the business-unit leadership team.

EDUCATION

Fordham University Bronx, NY

B.S. Finance May 2024

GPA: 3.67 / 4.00. Coursework included Valuation, Financial Statement Analysis, Corporate Finance and Business Statistics.

Member of the Finance Society; volunteered as a peer tutor in introductory finance.

INDEPENDENT WORK

LBO modeling practice

Independent modeling project 2026

- Built a 5-year LBO model for a fictional services company. Added a debt schedule, cash sweep and return sensitivities to study how operating assumptions affect sponsor returns.

SKILLS

Excel, PowerPoint, market research, commercial due diligence, customer analysis, financial statement analysis and LBO modeling practice. Interests: tennis, restaurant history and urban cycling.