[redacted]

Boston, MA | [redacted] | [redacted] | [redacted]

EDUCATION

University of Massachusetts Lowell Lowell, MA
B.S. Business Administration, Finance concentration Expected May 2027
GPA: 3.72 / 4.00 | Relevant coursework: Corporate Finance, Financial Accounting, Investments, Statistics.
Activities: Student Investment Fund; Finance Society.

PROFESSIONAL EXPERIENCE

Harbor Point Advisory Boston, MA
Investment Banking Summer Analyst June 2026 - August 2026
- Built and maintained trading-comparable analysis of 18 public industrial-services companies, reconciling revenue, EBITDA and valuation multiples to filings for a sell-side assignment.
- Supported diligence for a founder-owned business with $12 million in annual revenue; tracked customer-level requests and organized supporting materials in the data room.
- Revised company profiles and pitch-book pages following analyst review, keeping operating metrics and valuation references consistent across the presentation.
- Prepared deal-call notes that separated open diligence questions, document requests and next actions for the team.

Beacon Student Investment Fund Lowell, MA
Equity Analyst September 2025 - Present
- Developed a specialty-distributor investment pitch using a DCF, trading comparables and an earnings-based forecast; the student committee approved a 4% allocation in a $42,000 portfolio.
- Reviewed earnings releases and company filings to update forecasts and discuss changes to the investment thesis at weekly fund meetings.
- Contributed company-specific research to the fund's market update, distinguishing business performance from broader share-price movements.

Lakeside Recreation Center Lowell, MA
Front Desk Assistant September 2024 - May 2026
- Processed member payments and front-desk requests; trained new student employees on cash controls and opening procedures.

SELECTED FINANCE PROJECT

Valuation and M&A Case Competition
University team project February 2026
- Built a DCF and comparable-company analysis for a consumer-company case with an implied enterprise value of approximately $480 million; presented valuation assumptions and the team's recommendation to an alumni panel.

ADDITIONAL INFORMATION

Technical: Excel financial modeling, PowerPoint, Bloomberg; DCF and comparable-company analysis.
Interests: Distance running, Boston sports and behavioral economics.