[redacted]

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

PROFILE

Finance student interested in an investment banking analyst position. Experience at a small advisory firm and in a student investment fund, with exposure to company research, valuation, Excel and presentation materials. Balancing university coursework with a part-time campus job.

EDUCATION

University of Massachusetts Lowell Lowell, MA
B.S. Business Administration, Finance concentration Expected May 2027
GPA: 3.72 / 4.00. Relevant courses: Corporate Finance, Financial Accounting, Investments, Statistics.
Member of the Finance Society and Student Investment Fund.

WORK EXPERIENCE

Harbor Point Advisory Boston, MA
Investment Banking Summer Analyst June 2026 - August 2026

- Worked with the team on research, pitch books and Excel analysis for an industrial services sell-side assignment.
- Updated a spreadsheet of 18 public companies, including revenue, EBITDA, trading multiples and business descriptions.
- Helped with diligence for a founder-owned business with $12 million in annual revenue. Kept track of customer requests and materials in the data room.
- Attended deal calls and wrote meeting notes. Updated company profiles and presentation pages after feedback from the analyst.

Beacon Student Investment Fund Lowell, MA
Equity Analyst September 2025 - Present

- Research stocks for a student fund with $42,000 in capital. Read earnings materials and build Excel forecasts.
- Presented a specialty distributor pitch with a DCF and trading comparables. The student investment committee approved a 4% portfolio allocation.
- Help prepare the fund's weekly market update and discuss changes to the companies we follow.

Lakeside Recreation Center Lowell, MA
Front Desk Assistant September 2024 - May 2026

- Checked in members, answered questions and processed payments. Helped new student employees learn cash-control and opening procedures.

PROJECTS

Valuation and M&A Case Competition
University team project February 2026

- Worked on a consumer-company case with an implied enterprise value of approximately $480 million. Built a DCF and comparable-company analysis and presented our recommendation to an alumni panel.

SKILLS AND INTERESTS

Excel, PowerPoint, Word, Bloomberg, financial modeling, company research, teamwork and communication. Interests include distance running, Boston sports and behavioral economics.