[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.

[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.

[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.

[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.

[redacted]

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

PROFESSIONAL SUMMARY

Fund operations analyst with experience in loan administration, quarterly reporting and borrower data. Interested in moving into a private-credit analyst role. Good attention to detail, strong Excel skills and experience working with accounting and investment teams.

EMPLOYMENT

Harborline Credit Management New York, NY
Fund Operations Analyst January 2023 - Present

- Help maintain reporting for a direct-lending portfolio with approximately $1.2 billion of exposure and 26 borrowers.
- Collect borrower financial statements, update covenant templates and check calculations against the lender reporting requirements. Send missing items and exceptions to the investment team.
- Reconcile loan balances, interest and cash movements against administrator records. Help with quarterly investor reporting.
- Built an Excel tracker for statement delivery and covenant reporting dates. Follow up with internal teams about outstanding information.
- Worked on a 2026 reporting-template update that standardized the source-document references and review checklist.

Northbridge Fund Services Jersey City, NJ
Fund Accounting Intern June 2021 - August 2021

- Supported monthly reconciliations for private fund clients, including cash activity and expense allocations.
- Prepared backup schedules for accountant review and helped organize documents for the year-end audit.

EDUCATION

Baruch College, City University of New York New York, NY
B.B.A. Finance May 2022
GPA: 3.61 / 4.00. Relevant courses included Credit Analysis, Financial Accounting, Corporate Finance and Investments.

Member of the Finance and Economics Society.

CREDIT TRAINING PROJECT

Illustrative middle-market borrower case
Independent credit-analysis project 2026

- Built a debt-service and liquidity model for a fictional $45 million facility. Looked at cash generation, interest coverage and downside assumptions. Drafted a short memo describing the risks and questions to investigate.

SKILLS AND INTERESTS

Excel, loan administration, reconciliations, quarterly reporting and covenant data. Familiar with financial-statement analysis through coursework and independent study. Interests: distance walking, cooking and museum exhibitions.

[redacted]

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

PROFESSIONAL EXPERIENCE

Harborline Credit Management New York, NY
Fund Operations Analyst January 2023 - Present

- Maintained borrower and loan-reporting data for a direct-lending portfolio with approximately $1.2 billion of exposure across 26 borrowers; reconciled balances, interest and cash movements to administrator records.
- Checked borrower covenant templates against financial statements and lender reporting requirements, escalating missing inputs and calculation exceptions to the investment team.
- Built an Excel tracker for financial-statement delivery and covenant-reporting dates, keeping outstanding information visible for quarterly review.
- Prepared supporting schedules for quarterly investor reporting and documented reconciliations for accounting-team review.
- Standardized source-document references and the review checklist in a 2026 reporting-template update, giving reviewers a clearer audit trail for borrower inputs.

Northbridge Fund Services Jersey City, NJ
Fund Accounting Intern June 2021 - August 2021

- Prepared cash-activity and expense-allocation reconciliations for private fund clients, with supporting schedules for accountant review.
- Organized audit support and tied backup schedules to monthly fund-accounting records.

EDUCATION

Baruch College, City University of New York New York, NY
B.B.A. Finance May 2022
GPA: 3.61 / 4.00 | Coursework: Credit Analysis, Financial Accounting, Corporate Finance, Investments.
Activity: Finance and Economics Society.

INDEPENDENT CREDIT PROJECT

Illustrative middle-market borrower case
Independent credit-analysis project 2026

- Built a debt-service and liquidity model for a fictional $45 million facility, testing cash generation, interest coverage and downside assumptions; summarized risks and follow-up questions in a short credit memo.

ADDITIONAL INFORMATION

Skills: Excel, loan administration, reconciliations, covenant-data checks and quarterly reporting; financial-statement analysis through coursework and independent study.

Interests: Distance walking, cooking and museum exhibitions.