

PROFESSIONAL SUMMARY

Finance student with investment-banking internship and student-fund experience spanning valuation, sell-side diligence, sector screening, and public-equity research. Combines strong accounting coursework with hands-on Excel modeling and concise presentation skills.

EDUCATION

University of Massachusetts Lowell

May 2027

B.S. Business Administration, Finance Concentration; Minor in Economics | GPA: 3.72/4.00; Dean's List; Investment Banking Club

PROFESSIONAL EXPERIENCE

Harbor Point Advisory | Boston, MA

Jun 2026 - Aug 2026

Investment Banking Summer Analyst

- Built trading-comps and precedent-transaction analyses for an industrial-services mandate, evaluating 18 public companies and 11 transactions across revenue, EBITDA, and valuation multiples.
- Supported a sell-side process for a founder-owned business by organizing diligence requests, reviewing customer concentration, and drafting 12 CIM pages used in buyer outreach.
- Prepared weekly sector screens covering 60 lower-middle-market companies and summarized acquisition themes for senior bankers.
- Reconciled company filings, Capital IQ data, and management materials to maintain consistent operating and valuation assumptions across analysis and presentation pages.
- Presented weekly workstream updates to associates and vice presidents and incorporated feedback under one- to two-day turnaround requirements.

Beacon Student Investment Fund | Boston, MA

Sep 2025 - Present

Equity Analyst

- Pitched a long recommendation on a specialty distributor after building a three-statement model and DCF with base, upside, and downside cases; proposal was approved for a 4% portfolio position.
- Track quarterly results and valuation for four industrial holdings representing \$42,000 of student-managed capital.
- Reviewed earnings releases and industry news for six portfolio and watch-list companies and summarized thesis changes before weekly fund meetings.
- Presented valuation updates and downside risks to a 20-member committee and responded to questions on assumptions, catalysts, and position sizing.

Lakeside Recreation Center | Boston, MA

Sep 2024 - May 2026

Front Desk Associate

- Processed 150+ member interactions per shift and trained six new employees on cash controls, issue escalation, and closing procedures.

SELECTED FINANCE PROJECT

Valuation & M&A Case Competition | Team Lead

Feb 2026

- Built a DCF, trading-comps, and accretion/dilution model for a proposed \$480 million consumer acquisition.
- Presented valuation range, strategic rationale, financing mix, and key sensitivities to a panel of alumni bankers; placed second among 18 teams.

TRAINING & CREDENTIALS

Selected coursework: Financial Accounting, Corporate Finance, Investments, Statistics, Economics, and Financial Modeling. Completed weekly technical interview workshops through the Investment Banking Club.

LEADERSHIP & ACTIVITIES

Investment Banking Club - Training Lead; Finance Society; Intramural Soccer

SKILLS & ADDITIONAL

Excel (financial modeling, sensitivity analysis), PowerPoint, Bloomberg, Capital IQ; coursework: accounting, corporate finance, statistics

INTERESTS

Distance running, Boston sports, behavioral economics, and travel