

PROFESSIONAL SUMMARY

Strategy consultant with five sponsor diligence engagements across software, healthcare services, and industrial technology. Experienced in market sizing, customer research, cohort analysis, operating models, downside cases, and value-creation planning.

PROFESSIONAL EXPERIENCE

Summit Strategy Group | New York, NY

Sep 2024 - Present

Senior Associate

- Evaluated a **\$600 million** sponsor acquisition of a vertical-software provider by sizing a **\$4.2 billion** addressable market, assessing retention by cohort, and benchmarking 15 competitors.
- Built revenue and EBITDA cases linking customer adds, churn, pricing, sales capacity, and operating leverage; findings supported the investment committee's downside case.
- Led 35 customer and expert interviews to test product differentiation, switching costs, and cross-sell potential; synthesized conclusions into the commercial diligence report.
- Managed two analysts across data analysis, market research, and executive materials while coordinating daily workstreams with the client's deal team.
- Synthesized data-room analysis, expert calls, customer work, and management interviews into clear investment positives, diligence gaps, and underwriting questions.
- Supported a portfolio-company growth strategy by prioritizing eight verticals and identifying a **\$120 million** serviceable market based on customer needs and sales feasibility.

Summit Strategy Group | New York, NY

Jul 2022 - Aug 2024

Associate

- Completed five commercial diligence engagements across software, healthcare services, and industrial technology, typically supporting two-week sponsor timelines.
- Identified **\$18 million** of EBITDA initiatives for a portfolio company through pricing analysis, salesforce productivity, and procurement benchmarks.
- Benchmarked growth, margin, retention, and valuation metrics across 25 public and private peers to support commercial and investment conclusions.
- Developed executive-ready pages linking analysis to implications, open questions, and recommended next steps for client leadership.

EDUCATION

Fordham University

May 2022

B.A. Economics | GPA: 3.79/4.00; Magna Cum Laude

SELECTED FINANCE PROJECT

Private Equity Investment Thesis | Independent

May 2026

- Developed a 10-page thesis on a niche compliance-software platform, including market structure, unit economics, value-creation levers, and exit routes.
- Built a five-year LBO model with operating, leverage, and multiple sensitivities; tested returns under recession and customer-churn scenarios.

TRAINING & CREDENTIALS

Completed independent training in leveraged buyout modeling, transaction comparables, returns analysis, debt schedules, portfolio value creation, and investment-committee writing.

LEADERSHIP & ACTIVITIES

Fordham Consulting Club Alumni Mentor; New York Road Runners

SKILLS & ADDITIONAL

Commercial diligence, market sizing, cohort analysis, operating models, Excel, PowerPoint, Tableau; sectors: software, healthcare services, industrial technology

INTERESTS

Marathons, economic history, specialty coffee, and independent investing