

PROFESSIONAL SUMMARY

Hardworking finance student seeking an opportunity in investment banking where I can use my analytical and teamwork skills. Brings a dependable work ethic, attention to detail, and experience collaborating with different teams in deadline-driven environments.

CORE COMPETENCIES

Microsoft Office, Bloomberg, teamwork, communication, problem solving, organization, client service, process improvement, research, and project coordination

PROFESSIONAL EXPERIENCE

Harbor Point Advisory | Boston, MA

Jun 2026 - Aug 2026

Investment Banking Summer Analyst

- Helped senior bankers with valuation work and pitch books.
- Researched companies and industries for live projects.
- Worked on Excel models and PowerPoint presentations.
- Sat in on team calls, took notes, and helped keep project materials organized.
- Updated company profiles and assisted with general market research as requested.

Beacon Student Investment Fund | Boston, MA

Sep 2025 - Present

Equity Analyst

- Research stocks and present ideas to the club.
- Use Bloomberg and Excel to analyze companies.
- Attended weekly meetings and helped maintain the club's research files.

Lakeside Recreation Center | Boston, MA

Sep 2024 - May 2026

Front Desk Associate

- Checked students in and answered questions.
- Helped train new employees.

RELEVANT PROJECT EXPERIENCE

Valuation & M&A Case Competition | Team Lead

Feb 2026

- Worked with a team to research the company and market, build a basic Excel analysis, and prepare presentation materials.
- Helped complete the financial model and presented the team's recommendation to judges and classmates.

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

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, Finance Society, Intramural Soccer

SKILLS & ADDITIONAL

Microsoft Office, Bloomberg, teamwork, communication

INTERESTS

Distance running, Boston sports, behavioral economics, and travel