

PROFESSIONAL SUMMARY

Banking professional interested in investment banking, corporate finance, and client advisory opportunities. Brings a dependable work ethic, attention to detail, and experience collaborating with different teams in deadline-driven environments.

CORE COMPETENCIES

Microsoft Excel, underwriting, communication, Salesforce, problem solving, organization, client service, process improvement, research, and project coordination

PROFESSIONAL EXPERIENCE

Crestline Bank | Charlotte, NC

Jul 2023 - Present

Commercial Banking Analyst

- Underwrite loans and complete annual reviews.
- Spread financial statements and monitor client performance.
- Work with relationship managers and credit officers.
- Prepared internal credit memos and presented findings to senior members of the team.
- Used Salesforce to maintain client information and monitor upcoming review dates.

Crestline Bank | Charlotte, NC

Jun 2022 - Aug 2022

Credit Intern

- Helped with loan files and company research.
- Updated spreadsheets for the team.
- Researched companies and industries for prospective lending opportunities.

RELEVANT PROJECT EXPERIENCE

Industrials M&A Case Study | Independent

Apr 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 North Carolina at Charlotte - Belk College of Business

May 2023

B.S.B.A. Finance | GPA: 3.61/4.00

TRAINING & CREDENTIALS

Completed formal bank training in credit underwriting, projection cases, debt structuring, covenant analysis, collateral review, and risk-rating methodology.

LEADERSHIP & ACTIVITIES

Finance Club, volunteer tax assistance

SKILLS & ADDITIONAL

Microsoft Excel, underwriting, communication, Salesforce

INTERESTS

College basketball, golf, community tax preparation, and aviation