

YOUR EXPERIENCE IS STRONGER THAN YOUR RESUME.

See how strategic positioning, quantified proof, and finance-specific language turn credible experience into a resume that earns attention.

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CAREER PATHS

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FULL-PAGE RESUMES

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FEATURED TRANSFORMATIONS

Resume Rewrite Portfolio

Real universities. Fictional candidates. Representative transformations.

From capable finance student to banking-ready candidate

Jordan Lee | Representative fictional case study

BEFORE

Jordan Lee

Boston, MA | (617) 555-0101 | jordan.lee@example.com | linkedin.com/in/jordanlee-sample

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

Investment Banking Summer Analyst

Jun 2026 - Aug 2026

- 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

Equity Analyst

Sep 2025 - Present

- 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

Front Desk Associate

Sep 2024 - May 2026

- 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

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

May 2027

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

Fictional representative example - candidate identity, employment history, and results are illustrative.

AFTER

Jordan Lee

INVESTMENT BANKING | VALUATION | TRANSACTION EXECUTION

Boston, MA
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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

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

May 2027

PROFESSIONAL EXPERIENCE

Harbor Point Advisory | Boston, MA

Investment Banking Summer Analyst

Jun 2026 - Aug 2026

- 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

Equity Analyst

Sep 2025 - Present

- 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

Front Desk Associate

Sep 2024 - May 2026

- 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

Fictional representative example - candidate identity, employment history, and results are illustrative.

WHAT CHANGED

POSITIONING

Makes the investment-banking target obvious in the first five seconds.

PROOF

Replaces generic support language with valuation, diligence, and buyer-outreach evidence.

RELEVANCE

Surfaces a \$480M case, an approved fund pitch, and the transaction tools banks expect.

The service is not just formatting. It is positioning, evidence, and relevance.

Every rewrite is built around the target role and the proof a recruiter needs to see.

From generalist consultant to investor-minded PE candidate

Ethan Brooks | Representative fictional case study

BEFORE

Ethan Brooks

New York, NY | (212) 555-0105 | ethan.brooks@example.com | linkedin.com/in/ethanbrooks-sample

PROFESSIONAL SUMMARY

Consultant with broad strategy experience seeking investing opportunities in private equity. Brings a dependable work ethic, attention to detail, and experience collaborating with different teams in deadline-driven environments.

CORE COMPETENCIES

PowerPoint, Excel, research, strategy, communication, problem solving, organization, client service, process improvement, research, and project coordination

PROFESSIONAL EXPERIENCE

Summit Strategy Group | New York, NY Sep 2024 - Present

Senior Associate

- Support client engagements in strategy and due diligence.
- Analyze markets and create presentations.
- Manage junior team members.
- Joined client interviews and summarized key takeaways for the project team.
- Helped coordinate junior analysts and reviewed work before internal meetings.

Summit Strategy Group | New York, NY Jul 2022 - Aug 2024

Associate

- Conducted research and analysis for clients.
- Made slides and helped with team meetings.
- Supported research, analysis, and presentation development across multiple projects.

RELEVANT PROJECT EXPERIENCE

Private Equity Investment Thesis | Independent May 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

Fordham University May 2022

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

TRAINING & CREDENTIALS

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

LEADERSHIP & ACTIVITIES

University consulting club, running club

SKILLS & ADDITIONAL

PowerPoint, Excel, research, strategy, communication

INTERESTS

Marathons, economic history, specialty coffee, and independent investing

Fictional representative example - candidate identity, employment history, and results are illustrative.

AFTER

Ethan Brooks

PRIVATE EQUITY | COMMERCIAL DILIGENCE | VALUE CREATION

New York, NY

(212) 555-0105

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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

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

May 2022

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

Fictional representative example - candidate identity, employment history, and results are illustrative.

WHAT CHANGED

POSITIONING

Frames consulting experience through an investor's underwriting lens.

PROOF

Turns research tasks into a \$600M diligence story covering market size, churn, and downside risk.

RELEVANCE

Adds LBO thinking, value-creation work, and sponsor-ready communication.

The service is not just formatting. It is positioning, evidence, and relevance.

Every rewrite is built around the target role and the proof a recruiter needs to see.

From fund operations duties to private-credit relevance

Chloe Martin | Representative fictional case study

BEFORE

Chloe Martin

New York, NY | (212) 555-0110 | chloe.martin@example.com | linkedin.com/in/chloemartin-sample

PROFESSIONAL SUMMARY

Detail-oriented finance professional seeking to move from operations into private credit investing. Brings a dependable work ethic, attention to detail, and experience collaborating with different teams in deadline-driven environments.

CORE COMPETENCIES

Excel, fund accounting, Advent, communication, problem solving, organization, client service, process improvement, research, and project coordination

PROFESSIONAL EXPERIENCE

Ravenwood Asset Management | New York, NY

Senior Fund Operations Analyst

Jan 2025 - Present

- Reconcile fund activity and work with administrators.
- Prepare reports and answer investor questions.
- Help improve processes across the team.
- Reconciled cash activity and investigated differences with administrators and internal teams.
- Responded to investor, audit, and management requests for portfolio information.

Ravenwood Asset Management | New York, NY

Fund Operations Analyst

- Processed trades and reconciled accounts.
- Worked with internal teams and service providers.
- Updated recurring reports and helped document operational procedures.

Hudson Credit Fund | New York, NY

Student Credit Analyst

- Participated in a student investment fund.
- Researched companies and presented to the group.

RELEVANT PROJECT EXPERIENCE

Private Credit Underwriting Case | Independent

- 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

Baruch College - Zicklin School of Business

B.B.A. Finance, Minor in Economics | GPA: 3.70/4.00; Finance and Economics Society

TRAINING & CREDENTIALS

Alternative Investments Certificate. Training in credit underwriting, debt waterfalls, covenant design, recovery analysis, portfolio monitoring, and private-fund economics.

LEADERSHIP & ACTIVITIES

Alternative Investments Club, women's finance network

SKILLS & ADDITIONAL

Excel, fund accounting, Advent, communication

INTERESTS

Pilates, contemporary art, women's finance networks, and credit markets

Fictional representative example - candidate identity, employment history, and results are illustrative.

AFTER

Chloe Martin

PRIVATE CREDIT | PORTFOLIO ANALYSIS | UNDERWRITING

New York, NY
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PROFESSIONAL SUMMARY

Private credit fund-operations analyst with exposure to **\$1.2 billion** across first-lien, unitranche, and mezzanine strategies. Experienced in covenant monitoring, loan funding, portfolio reporting, waterfall validation, and cross-functional deal support.

PROFESSIONAL EXPERIENCE

Ravenwood Asset Management | New York, NY

Senior Fund Operations Analyst

Jan 2025 - Present

- Review daily cash, position, and P&L reconciliations for **\$1.2 billion** across three private credit vehicles investing in first-lien, unitranche, and mezzanine loans.
- Analyze borrowing-base and covenant packages for 26 portfolio companies, escalating leverage, liquidity, and reporting exceptions to investment and finance teams.
- Built an automated waterfall and fee-validation tool that reduced quarterly review time **45%** and identified **\$86,000** of administrator corrections.
- Coordinate funding notices, repayments, amendments, and valuations with deal teams, treasury, counsel, and third-party administrators.
- Supported quarterly valuation by reconciling borrower financials, interest accruals, principal balances, amendments, and price-support documentation across the portfolio.
- Prepared investor and audit support covering capital activity, portfolio exposure, fee calculations, and performance data with no material control exceptions.

Ravenwood Asset Management | New York, NY

Fund Operations Analyst

Jul 2022 - Dec 2024

- Processed and reconciled **400+** loan funding and repayment events annually while maintaining complete support for investor and audit requests.
- Created portfolio dashboards tracking spread, maturity, industry, sponsor, leverage, and covenant-reporting status across 70 borrowers.
- Prepared weekly cash forecasts incorporating loan fundings, repayments, interest receipts, fees, expenses, and investor capital activity.
- Documented recurring controls and exception procedures used by operations, finance, administrators, and external auditors.

Hudson Credit Fund | New York, NY

Student Credit Analyst

Sep 2021 - May 2022

- Prepared a credit memo on a software issuer by analyzing recurring revenue, cash conversion, leverage, interest coverage, covenants, and recovery scenarios.

EDUCATION

Baruch College - Zicklin School of Business

B.B.A. Finance, Minor in Economics | GPA: 3.70/4.00; Finance and Economics Society

May 2022

SELECTED FINANCE PROJECT

Private Credit Underwriting Case | Independent

Apr 2026

- Underwrote a fictional **\$40 million** first-lien loan by analyzing business quality, free cash flow, leverage, coverage, collateral, covenants, and sponsor support.
- Built base and downside cases, estimated recovery value, and recommended pricing and covenant protections to a mock investment committee.

TRAINING & CREDENTIALS

Alternative Investments Certificate. Training in credit underwriting, debt waterfalls, covenant design, recovery analysis, portfolio monitoring, and private-fund economics.

LEADERSHIP & ACTIVITIES

Alternative Investments Club Alumni Mentor; Women in Private Credit Network

SKILLS & ADDITIONAL

Credit analysis, debt waterfalls, covenant monitoring, portfolio reporting, Excel, Power Query, Advent Geneva, Bloomberg

INTERESTS

Pilates, contemporary art, women's finance networks, and credit markets

Fictional representative example - candidate identity, employment history, and results are illustrative.

WHAT CHANGED

POSITIONING

Connects operations experience directly to private-credit underwriting.

PROOF

Elevates \$1.2B of exposure, 26 borrowers, covenant monitoring, and recovery analysis.

RELEVANCE

Moves process work into credit judgment, risk monitoring, and investment-committee language.

The service is not just formatting. It is positioning, evidence, and relevance.

Every rewrite is built around the target role and the proof a recruiter needs to see.

Ten paths. One goal: make the fit undeniable.

The complete portfolio includes matched before-and-after resumes for each transition below.

01 Non-target student
Repositioned for Investment Banking

02 Big Four CPA
Repositioned for Investment Banking

03 Commercial Banking
Repositioned for Investment Banking

04 FP&A
Repositioned for Corporate Development

05 Strategy Consulting
Repositioned for Private Equity

06 Operations + MBA
Repositioned for Investment Banking

07 Software Engineering
Repositioned for Quantitative Research

08 Wealth Management
Repositioned for Equity Research

09 Military Leadership
Repositioned for Corporate Finance

10 Fund Operations
Repositioned for Private Credit

READY FOR YOUR REWRITE?

Stop making recruiters translate your experience.

Wall Street Playbook turns what you have done into the story your target role needs to hear.