

Julie Richards

Investment Banking Associate

Contact Details

📞 555-555-555

✉ julierichards3@gmail.com

📍 Seattle, WA

Core Skills

- Private Equity
- Investment Banking
- Financial Modeling/Valuation
- Corporate Development
- Market Research
- M&A Transactions
- Middle-market Commercial Debt
- Client/Third-party Due Diligence

Professional Profile

Dedicated Investment Banking Associate with experience in capturing business opportunities by supporting transactional execution, including preparing marketing pitches, formulating financial analyses, and presenting internal committee memoranda. Passionate about developing an understanding of industry trends to provide value-added advice to clients. Demonstrated ability to manage complex projects in fast-paced entrepreneurial environments alongside team members.

Career Summary

Jan 2018 - Present

JPMorgan Chase & Co., Seattle, WA
Investment Banking Associate

Outline

Prepare cash flow models and draft memorandums with clients/ investors, for one of the oldest financial institutions that offers financial solutions to millions of consumers, small businesses, and prominent corporate, institutional, and government clients.

Key Responsibilities

- Advise on acquisitions, divestitures, and leveraged buy-outs, as well as execute capital transactions, including equity offerings and debt issuances.
- Conduct market research, review financial data, to build detailed models and implement M&A strategic initiatives.
- Develop pitch materials to secure new business, monitor industry trends, and share insightful reports with the broader team, senior executives, and clients.
- Generate novel ideas and analytical materials in support of new client meetings.
- Deliver exceptional customer service through answering calls and resolving problems in a calm and professional manner.
- Handle client inquiries, such as loan histories, posting errors, changes of address, line of credit advances, construction loan draws, notary services, and lien releases.
- Serve as liaison between lender and loan processing to request and coordinate preparation of loan documents and schedule closings.
- Assist in maintaining commercial credit files by scanning and indexing borrower financial records into the bank's digital record-keeping platform.
- Obtain and verify collateral documents (life insurance assignment and cash collateral accounts) for delinquent taxes to order future advance endorsements.
- Assess potential investments from an ethical standpoint to ensure compliance with legal guidelines, while stay abreast of financial market developments to identify new business.

Key Achievements

- Priced and closed \$23B fixed income securities six months ahead of schedule.
- Grew mutual fund value by 57%, while closely monitoring the net asset value and making superior investment decisions.
- Authored and published 86 periodic retail market industry reports that helped 60+ client companies boost their profits by \$40M+.

Jul 2013 - Dec 2017

Raymond James, Seattle, WA
Investment Banking Associate

Outline

Facilitated transactions by providing information about investments, for a holding company that offers financial services to individuals, corporations, and municipalities through subsidiary companies engaged primarily in investment and financial planning.

Key Responsibilities

- Managed all aspects of transaction execution, from pitch through closing, including coordinating due diligence and negotiating terms.
- Dispensed M&A, capital raising, and strategic advisory services to entrepreneurs, family-owned companies, private equity sponsors, and major corporations.