

Professional Profile

Results-driven Investment Banking Specialist with a successful 20 year career providing asset management services and developing investment strategy for high-value clients. Master in Business Administration with demonstrated success in driving client acquisition through contact strategy and data-driven asset management. CFA-Certified Financial Analyst, highly skilled in optimizing investments through extended market research and financial modelling.

Core Skills

- MBA
- Complex Data Analysis
- Asset Valuation
- Financial Models
- Investment Strategy
- Client Acquisition

Career Summary

Jul 2017 - Present

**KC Bank, New York City, NY
Investment Banking Specialist**

Outline

Conduct research and build financial models to support new business generation and the execution of M&A transactions for KC Bank, a global investment bank with an annual turnover of \$2.4 billion.

Key Responsibilities

- Prepare, analyze, and explain historical and projected financial information
- Work as part of a cross-functional team to complete projects and optimize growth
- Coordinate and perform business due diligence and execute M&A transactions
- Prepare marketing materials, confidential information presentations, management presentations, and other presentations
- Perform valuation and ad hoc financial analyses to contribute to investment strategy
- Assist in the marketing and execution of existing engagements
- Provide corporations with industry-specific advice on mergers and acquisitions
- Build relationships and maintain direct contact with clients, prospective clients, and professional advisors

Key Achievements

- Collaborated with the marketing team to develop targeted online marketing materials in 2020, resulting in over \$5M in new business generation.
- Increased client portfolio value by 15% in two years through improved contact and data-driven investment advice, exceeding company KPIs by 20%.
- Suggested the creation of a junior data analyst role which improved productivity by 28%.