

Experience

Cib-investment Banking Associate, Real Estate – Fritsch, Lockman and Pfeffer, Boston, MA 02/2018 – Present

- Maintain / design Excel spreadsheets and PowerPoint slides on the corporate M&A market and asset acquisition and divestiture market for presentations and for comparative analysis
- Self-starter who will take ownership of tasks and has proven execution skills track record of coordinating diverse teams
- Strong analytical skills, knowledge of basic accounting and financial concepts
- A positive, highly motivated individual who exhibits strong leadership and management qualities
- Commitment to excellence and maintaining high professional and ethical standards
- Strong understanding of professional ethics and the regulatory environment
- Experience in Investment Banking (corporate finance/M&A) or equivalent
- Solid understanding of databases such as FactSet, CapitalIQ, Merger market, Factiva
- MS Office skills - should be good in MS PowerPoint, MS Excel, and MS Word

Investment Banking Associate, Insurance – Hauck, Lesch and Romaguera, Boston, MA 06/2011 – 01/2018

- Should have prior team leading experience
- All standard investment banking valuation methodologies
- Various steps in the sell-side execution process
- Prior banking experience in M&A or Diversified Industries
- Core modeling and valuation experience
- Comfortable reading and interpreting financial statements
- Interest in developing a career in Technology Investment Banking
- Strong interest and understanding of the Healthcare industry
- Previous investment banking experience
- Prior work experience involving financial analysis or transaction execution
- Exceptional work ethic and a high level of enthusiasm, initiative and leadership potential

Education

Massachusetts College of Art – Bachelor's in Finance

Skills

- Passion for the business opportunities created by sustainable infrastructure, technology, and industrial disruption
- Outstanding technical and analytical skills
- Strong financial modeling / valuation and analytical skills
- Energetic and decisive, with high level of integrity
- Motivation to work in a dynamic, international and diverse environment
- Strong interest in M&A and capital markets
- Significant investment banking or equivalent experience
- Experience of financial valuations with knowledge of DCF, LBO, merger modeling, comparable companies, precedent transactions etc