

# INVESTMENT BANKING RESUME

123 Your Address City, State, Zip Code (xxx)-xxx-xxxx your@email.com

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Senior Investment Banking professional with 10+ years of experience in global asset management across diverse financial markets. Track record of success in maximizing return on investment and minimizing risk by conducting comprehensive investment research and analysis, due diligence, valuation of assets, and originating potential investment opportunities.

## PROFESSIONAL EXPERIENCE

COWEN & COMPANY, New York, NY

*Senior Investment Analyst, Private Equity and Fixed Income, September 2014 – Present*

- Conduct deep-dive financial and credit analysis of various investment portfolios to evaluate potential investment opportunities in global markets
- Successfully manage more than \$300M in equity and debt investments in the energy, consumer products, and technology sectors
- Communicate directly with clients, delivering a presentation on a variety of topics, including current top investment themes, options education, and risk management
- Establish effective investment strategies for clients

MOSS ADAMS, Irvine, CA

*Investment Banking Analyst, June 2010 – August 2014*

- Played a key role as a part of a highly skilled team of investment bankers to conduct research and financial analysis for diverse industry clients
- Identified and researched companies in the target market with a history of acquisitions
- Conducted comprehensive due diligence on new clients to develop a detailed understanding of the clients' businesses
- Contributed to the preparation of fact-based reports and materials outlining the clients' businesses, growth opportunities, and possible collaborations with buyers

## EDUCATION

YALE UNIVERSITY, New Haven, CT

*Bachelor of Science in Applied Economics & Finance, Nov 2009*

Honors: *cum laude* (GPA: 3.7/4.0)

## ADDITIONAL SKILLS

- Proven expertise in investment management, financial due diligence, sustainable investing, financial modeling, mergers & acquisitions, and capital & financial markets
- Strong analytical, technical, communication, and research skills
- Bilingual in Spanish and English