

**EXPERIENCE**

**EXECUTIVE ASSISTANT, INVESTMENT BANKING**

**Dallas, TX**

07/2014 – present

- Create and maintain files of manager's correspondence, records, etc
- Responsible for diary management, travel arrangements and scheduling meetings
- Provide administrative support to officers and associates
- Providing support for office related admin
- Preparing travel and entertainment expense reports and provide deal expense breakdown reports
- Telephone cover, lunch cover and assisting in for other support staff
- Assist with special projects such as conference planning/coordination

**INVESTMENT BANKING CONTROLLER**

**New York, NY**

08/2007 – 04/2014

- Assist in testing, development and maintenance of IT tools
- Coordinate settlements of revenue sharing between MS and MUMSS working with Mitsubishi and MS overseas finance teams
- Revenue booking and accounting management for Advisory (e.g. M&A), Equity/Debt capital market products
- Management of deal pipeline and updates
- Preparation of various daily/weekly/monthly/quarterly financial reports to the business unit and FCG management
- Balance sheet management
- Create invoice to bill expenses

**INVESTMENT BANKING**

**Detroit, MI**

08/2002 – 06/2007

- Continue to develop and improve the process and practice of knowledge and content management within TMT/Industrials
- Assist in the development and continued cultivation of client relationships
- Strong working knowledge of Excel to develop financial models
- Assist Management in instilling a sense of urgency and client focus across the organization
- Manages the administrative assistant and market and project coordination functions for the department
- Assess the effectiveness of established operational risk management controls
- Contribute to the development of KM and Corporate Finance analysis tools to improve the efficiency of junior bankers

**EDUCATION**

**SAN DIEGO STATE UNIVERSITY**

**Bachelor's Degree in Finance**

**SKILLS**

- Superior knowledge of the Microsoft Office suite (Word, PowerPoint, Excel) and the ability to quickly and independently learn a variety of industry software platforms
- Proven ability to pay close attention to detail and multi-task under tight deadlines
- Excellent interpersonal, presentation, oral and written communication skills in order to convey complex factual and conceptual information to others and promote the interests of CIBC
- Excellent understanding of financial statements, credit analysis and accounting principles
- Drive, enthusiasm, creativity and excellent interpersonal skills, particularly in dealing with teams in different offices
- Strong quantitative and technical abilities
- Excellent analytical ability including demonstrated knowledge of valuation techniques and practices
- Strong verbal and written communications skills
- Ability to work as part of a team in an environment that demands excellence, time and energy
- Strong technical, computational and quantitative skills