

# **ROBERT CHEN, CFA**

## **Financial Analyst**

### **CONTACT INFORMATION**

Email: robert.chen@finance.com

Phone: +1 (646) 555-3721

Location: New York, NY 10005

LinkedIn: [linkedin.com/in/robertchen-cfa](https://linkedin.com/in/robertchen-cfa)

### **PROFESSIONAL SUMMARY**

Detail-oriented Financial Analyst with 5+ years of experience in investment analysis, financial modeling, and portfolio management. CFA charterholder with expertise in equity research, valuation, and risk assessment. Proven track record of delivering actionable insights that drive investment decisions and optimize portfolio performance.

### **PROFESSIONAL EXPERIENCE**

Senior Financial Analyst | Goldman Sachs | March 2022 - Present

- Conduct comprehensive financial analysis and valuation of public companies across technology sector
- Build complex financial models (DCF, LBO, M&A) supporting \$500M+ in transactions
- Perform due diligence on potential investments and provide buy/sell recommendations
- Monitor portfolio of \$2B+ in assets and prepare quarterly performance reports
- Collaborate with portfolio managers on investment strategy and asset allocation
- Achieved 15% alpha generation through sector rotation strategy
- Tools: Bloomberg Terminal, FactSet, Capital IQ, Excel VBA, Python

Financial Analyst | JPMorgan Chase | June 2020 - February 2022

- Analyzed financial statements and prepared equity research reports for banking sector
- Conducted industry research and competitive analysis for 20+ companies
- Created financial models forecasting revenue, earnings, and cash flows
- Presented investment recommendations to senior management and clients
- Managed client relationships and provided market insights

- Software: Bloomberg, Reuters Eikon, Morningstar Direct, SQL

Junior Analyst | Morgan Stanley | July 2019 - May 2020

- Supported senior analysts in financial modeling and data analysis
- Prepared presentations and pitch books for client meetings

- **Monitored market trends and economic indicators**

- Conducted company screening and preliminary valuations
- Maintained databases and performed ad-hoc analysis

## EDUCATION

Master of Business Administration (MBA) - Finance | NYU Stern School of Business | 2019

- Concentration: Corporate Finance and Investment Management

- **GPA: 3.85/4.0**

- **Dean's List, Finance Club President**

Bachelor of Science in Economics | University of Pennsylvania | 2017

- **Minor in Mathematics**

- Graduated Summa Cum Laude, GPA: 3.9/4.0

## CERTIFICATIONS & LICENSES

- Chartered Financial Analyst (CFA) - CFA Institute (2021)

- **Financial Risk Manager (FRM) - GARP (2022)**

- **Series 7 - FINRA (2020)**

- **Series 63 - FINRA (2020)**

## **TECHNICAL SKILLS**

Financial Analysis: Financial Modeling, Valuation (DCF, Comparable Companies, Precedent Transactions)

Investment Analysis: Equity Research, Credit Analysis, Portfolio Management, Risk Assessment

Financial Tools: Bloomberg Terminal, FactSet, Capital IQ, Reuters Eikon, Morningstar Direct

Programming: Excel (Advanced VBA), Python (pandas, NumPy), SQL, R

Software: PowerBI, Tableau, SAP, Oracle Financial Services

Accounting: GAAP, IFRS, Financial Statement Analysis, Ratio Analysis

Mathematics: Statistics, Probability, Calculus, Linear Algebra, Econometrics

## **AREAS OF EXPERTISE**

- **Equity Research & Analysis**
- **Financial Modeling & Forecasting**
- **Mergers & Acquisitions (M&A);**
- **Leveraged Buyout (LBO) Analysis**
- **Portfolio Optimization**
- **Risk Management & Hedging**
- **Quantitative Analysis**
- **Market Research & Due Diligence**
- **Investment Strategy**
- **Corporate Valuation**

## **KEY PROJECTS**

## **Investment Portfolio Analysis (2024)**

- Developed algorithmic trading strategy using Python achieving 18% annual return
- Implemented risk management framework reducing portfolio volatility by 25%

## **Technology Sector Research (2023)**

- Published comprehensive report on AI companies valued at \$50B+
- Recommendations resulted in 22% outperformance vs. benchmark

## **M&A; Valuation Model (2022)**

- Built complex LBO model for \$1.2B acquisition in healthcare sector
- Model accuracy within 3% of actual transaction value

## **PUBLICATIONS & PRESENTATIONS**

- "Emerging Trends in FinTech Investment" - Financial Analysts Journal, 2024
- Speaker at CFA Society New York Annual Conference 2023
- "ESG Integration in Portfolio Management" - Investment Research Report, 2023

## **PROFESSIONAL AFFILIATIONS**

### **• CFA Society New York - Member (2021-Present)**

- Global Association of Risk Professionals (GARP) - Member (2022-Present)
- National Association of Securities Professionals - Member (2020-Present)

## **LANGUAGES**

- English - Native

- **Mandarin Chinese - Fluent**
- **Spanish - Conversational**

## **ADDITIONAL INFORMATION**

- **Authorized to work in the United States**
- **Available for domestic and international travel**
- **Strong presentation and communication skills**