
PROFESSIONAL EXPERIENCE

Protegrity Advisors – Mergers & Acquisitions

September 2017 – October 2019

Research Analyst

Lead Analyst managing the process to facilitate the sale of businesses with the following roles & accomplishments:

- Coordinate creation of the Confidential Information Memoranda, also known as a pitch deck. (A presentation that provides an intensive overview of a business).
- Successfully participated the sale of businesses across Healthcare, Software, Consumer and Commercial services, Manufacturing & Distribution.
- Lead ‘deal-sourcing’ business development efforts to create an extensive and proprietary network of Private Equity, Family Office, Corporate Development and Search Fund professional.
- Perform precedent transaction analysis to find expected valuation range and set client expectations.
- Manage the negotiation of confidentiality agreements for interested buyers.
- Spearhead discussions post-NDA, answering questions regarding the businesses.
- Successfully sourced multiple Letters of Intent and Indications of Interest across sectors including; Manufacturing, Distribution, SaaS, Healthcare & Durable Medical Equipment.
- Due diligence lead, data room prep, coordinating auditors and information disclosure.
- Maintain Client relationships.

Envestnet | Portfolio Management Consultants

June – August 2017

Intern, Product Management & Portfolio Research

- Analyzed 400+ existing portfolios to determine if they should be promoted or terminated, mitigating PMC’s risk.
- Provided support to Denver research team, searching for appropriate Small to Mid-cap and Fixed-Income portfolios for PMC’s select list.

EDUCATION, HONORS, AND LEADERSHIP

Stony Brook University, State University of New York

Bachelor of Science in Business Management, Specialization in Finance

Graduated: December 2017, Cumulative GPA: 3.7/4.00

Study Abroad, Italy, Summer 2016

New York Society of Security Analysts, Stony Brook Chapter (Now CFA Institute)

President and Founder of the Stony Brook University Chapter - NYSSA, CFA Institute Research Challenge Team Leader

SKILLS AND VOLUNTEERING

Computer Skills: Mastery with MS Office Suite, Pitchbook, Bloomberg, Publisher, HTML, CSS, Bootstrap and JavaScript.

Humanitarian assistance: Intern, Touro Law Center 2014, Guatemala Mission trip 2013.