

James Talavera

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EDUCATION

California State Polytechnic University, Pomona - Cumulative GPA: 3.3

Pomona, California

Major: Bachelor of Science, Finance, Real Estate, and Law

Expected Graduation: May 2019

Relevant Coursework: Asset Allocation, Business Law, Corporate Finance, Economic Statistics, Financial Accounting, Intermediate Accounting, Macroeconomics, Managerial Accounting, Microeconomics, Money and Banking, Principles of Statistics

EXPERIENCE

Goldman Sachs

Salt Lake City, Utah

Account Management Fall Intern

September 2017-December 2017

- Gather and analyze data to improve operational efficiency of Sales/Trading and Merchant Banking desks
- Met with senior corporate bankers to discuss most effective product structures for the company's needs
- Took an active role in the lifecycle of transactions by implementing collateral management and maintenance of securities and cash
- Automated departmental reporting tasks for the Reference Data Operations team to improve operational flow and risk mitigation

First Republic Bank

San Francisco, California

Business Banking Summer Analyst

June 2017 – August 2017

- Spread business financial statements, personal financial statements and HNW tax returns
- Received training in Tax analysis, Financial statements, and Credit
- Constructed cash flow models and financial statement analyses
- Conducted market research in different industry verticals (Entertainment, Technology)
- Contributed to analysis of large entertainment/tech companies that led to approval of \$300MM+ credit facilities and syndications

Kaiser Permanente

Oakland, California

Treasury Summer Analyst, Strategy Team

June 2016 – August 2016

- Collected, organized, and analyzed 2016 Q2 report of \$200M leased medical/IT equipment for Treasurer's review
- Met with senior corporate bankers to discuss most effective product structures for the company's needs
- Presented relative cost structure findings on top solar energy contractors to build renewable energy fixtures on 15 hospital buildings
- Modeled lease costs of 10 medical office buildings to determine which acquisitions from lessors would be most beneficial

LEADERSHIP & PROFESSIONAL DEVELOPMENT

NASA-CPP Startup

Pomona, CA

Business Member

December 2017 – Present

- Researched competitor products/patents, reached out to potential customers, and developed strategies
- Provided feedback on the product development according to market research findings

VentureCapital.Org

Salt Lake City, Utah

Investor Liaison

October 2017 – Present

- Evaluated pitch decks and offered feedback to improve deal attractiveness
- Coached entrepreneurs on presentation style to help improve their pitch to VC, Angel, and other investors
- Assessed the credibility of business models, company valuations, and revenue projections

Finance Society

Pomona, California

President

May 2017 – Present

- Led bi-weekly club meetings to the largest membership base of all student clubs in the College of Business
- Coordinated professional development services (workshops, guest speakers)
- Delivered presentations on career tracks available to finance majors

CFA Institute Research Competition

Orange, California

Equity Research Analyst (Cal Poly Representative)

November 2016 – March 2017

- Worked with a team of 5 students to analyze and value a small cap commercial bank
- Read through 10K, 10Q, 8K and other financial forms to arrive at conclusions about the company
- Analyzed the composition of target company loan portfolio to determine credit risk and exposure to potential charge-offs
- Presented findings, research report and investment recommendation to a panel of CFA charterholders in a competitive format

Other Affiliations: Salt Lake City Angels, Association of Latino Professionals for America, Real Estate Association

OTHER SKILLS & INTERESTS

Computer: Bloomberg, Factset, Microsoft Applications (Excel, Word, PowerPoint & Outlook), R Studio

Language: Fluent in Spanish

Other Interests: Tennis, Skiing, Cooking