

James Talavera

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EDUCATION

California State Polytechnic University, Pomona - Cumulative GPA: 3.3

Pomona, California

Major: Bachelor of Science, Finance

Expected Graduation: December 2018

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

EXPERIENCE

First Republic Bank

San Francisco, California

Business Banking Summer Analyst

June 2017 – September 2017

- Monitor loan maturity reports and alert Commercial Bankers and Credit Analysts of upcoming maturities
- Assist with financial reporting covenant monitoring
- Spread business financial statements, personal financial statements and individual tax returns
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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 follow through with building new 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

Umpqua Bank

Eureka, California

Community Banking Rover

May 2014 – January 2016

- Completed teller transactions with very sensitive information
- Trained new employees in specific functions of computer software as well as customer service
- Met and exceeded sales expectations with stellar manager quarterly reviews

LEADERSHIP & PROFESSIONAL DEVELOPMENT

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
- Made executive board appointments to help with administrative duties

Vice President of Professional Development

November 2016 – May 2017

- Coordinated professional development services (workshops, guest speakers)
- Helped 2 direct reports manage their individual roles in the club
- Delivered presentations on career tracks available to finance majors

CFA Institute Research Competition

Orange, California

Equity Research Analyst (Cal Poly Representative)

November 2016 – Present

- 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

SEO (Sponsors for Educational Opportunity) EDGE

New York, NY

Participant (Banking)

December 2016 – Present

- Completed training and assessments focused on developing technical skills, industry knowledge, and attention to detail
 - (Fundamentals of Bonds/Debt, Corporate Finance, Financial Statement Modeling, and more on Wall Street Prep)
- Receive individualized coaching to achieve targeted technical and professional developmental goals

Other Affiliations: Student Managed Investment Fund, Association of Latino Professionals for America, Real Estate Association

OTHER SKILLS & INTERESTS

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

Language: Fluent in Spanish

Other Interests: Tennis, Swimming, Cooking