

Kevin Lee

8100 River Road Apt. 1011 North Bergen, NJ 07047 | 917-270-1812 | leek3@allegheny.edu | linkedin.com/in/kevin-lee-ac

EDUCATION

Allegheny College | May 2023

Cumulative GPA: 3.92/4.00

Bachelor of Arts in Business & Minor in Computer Science

Relevant Coursework: Fund of Financial Accounting, Macroeconomic Theory, International Business, Advanced Business Economics, Business & Managerial Economics, Economics of Entrepreneurship

Honors & Awards: Alden Scholar Dean's List (Fall 2020 – Present), Trustee Scholarship (\$33K – based on academic performance), OΔE invitation (international recognition for outstanding economic achievements)

PROFESSIONAL EXPERIENCE

Jodabit Partners | Toronto, ON (Remote)

Sept 2022 – Present

Private Equity Fall Analyst

- Investigated valuation methodologies through leveraged buyout, precedent transactions, and trading comparable analysis; practiced completing financial statement modeling and leveraged buyout modeling
- Performed industry research and due diligence on firm's acquisition targets; generated investment memos advising business evaluations based on strategic assessment of the industry, business, and overall market
- Reviewed and analyzed NDAs, CIMs, financial statements, and LBO financial models; forecasting future projections of potential long-term investing opportunities of multiple companies for senior management

Caterpillar Labs | New York, NY (Remote)

Sept 2022 – Present

Venture Capital Associate Intern – Cryptocurrency & Blockchain

- Built a database of 500+ high growth start-ups; consulted companies for potential venture capital funding

Barclays | Whippany, NJ

Jun 2022 – Aug 2022

Internal Audit Summer Analyst – Financial Crimes, Anti Money Laundering & Compliance

- Audited Barclays' U.S. branches through scientific methodology and interviewed stakeholders; inspected various business models to improve operations and satisfy management's key objectives and risk appetite
- Drafted the global compliance monthly update report for July 2022 and August 2022, which are used to update the annual report for financial conduct risks regarding markets, technology, and regulatory laws

LEADERSHIP & EXTRACURRICULARS ACTIVITIES

Allegheny College | Meadville, PA

Sept 2022 – Present

Financial Accounting & Generalist Economics Tutor

- Selected to assist professors by tutoring students in financial accounting and all economics course subjects

Student Managed Investment Fund | Meadville, PA

Aug 2022 – Present

Co-Founder, Executive Board Member, Head Trader & Senior Analyst

- Conducted DCF modeling, trading comparable, and precedent transactions analyses using data from Bloomberg terminals and SEC filings; researched market, industry, and company data for investments
- Mentored and managed five analysts on technical skills and career opportunities in investment banking

Wolf Trades | Online Channel

Mar 2020 – Present

Mentee, 1 on 1 Trading Mentorship with Roland Wolf

- Studied small market capitalization stocks by conducting technical analysis, analyzing SEC filings, and economic theory; generated a 400% return on \$MARA and a ~100% (\$5K) gain on the entire portfolio
- Evaluated risk factors through a company's financing patterns by reading through SEC filings; determined the strike price of a private investment in public equity offering to estimate levels of technical resistance

SKILLS & INTERESTS

Skills & Certifications: JP Morgan Virtual Investment Banking Experience, Wall Street Prep Financial & Valuation Modeling, Bloomberg Market Concepts, Wolf Trades, Python, Java, VITA IRS Certification

Interests: Day Trading, Poker, Volunteering, Skiing, Mountain Biking, Body Building, Track, Lacrosse