

Luke Nelson

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EXPERIENCE

Intrinsic, Denver, Colorado

June 2022 – August 2023

Valuation Senior Associate

- Performed fair market value valuation analysis on a variety of private entities within various industries using accepted and relevant valuation approaches and theory utilizing discounted cash flow, market multiples, and option pricing models
- Collected and reviewed client and market data pertinent to each engagement by performing economic, industry, market, and competitor research
- Iteratively improved and enhanced valuation models and tools to drive engagement efficiencies, minimize redundancies, and maximize accuracy

Quish, Boulder, Colorado

November 2021 – June 2022

Finance & Accounting Intern

- Analyzed wealth management and family office portfolio performance on a monthly and quarterly basis for routine client communications
- Built a client-facing portal system to provide each client with a repository of monthly account statements
- Built a client-facing fee statement system
- Corresponded with, and onboarded clients to the Charles Schwab advisor platform

Cuvée, Denver, Colorado

January 2021 – July 2021

Business Development Intern

- Analyzed public and private data to research and identify profitable vacation destinations for company expansion, resulting in over \$100 million of portfolio growth
- Built a pro forma revenue model in which multiple reports are inputted, and summaries are calculated by quarter and year
- Analyzed and cross-sectioned sales data with pivot tables to identify growth opportunities
- Researched acquisition and partnership targets, performed preliminary due diligence, and built individualized pitch decks
- Repaired broken Excel files, implemented macros to streamline workflow processes, and documented fixes

EDUCATION

University of Colorado Boulder – Leeds School of Business

August 2019 – June 2022

Bachelor of Science in Business Administration with an emphasis in Finance and Information Management & Analytics

Cumulative GPA: 3.71/4.00

- **Relevant Projects:** Participant of New Venture Challenge at the University of Colorado Boulder. Collaborated with peers and program mentors to develop and bring to market a new brand, product, and unique sales proposition. *Watercan*, was an early-stage, pre-seed funding startup with the goal of delivering highly sustainable, canned water to consumers.
- **Relevant Courses:** Derivative Securities, Investment and Portfolio Management, Principles & Fundamentals of Financial Analysis, Business Data Management

LEADERSHIP AND ACTIVITIES

Alpha Kappa Psi, Gamma Zeta Chapter, Boulder, Colorado

November 2020 – May 2022

Member

- Live up to the core values of Brotherhood, Unity, Knowledge, Integrity, and Service
- Attended all chapter meetings and community service events

Leeds Investment and Trading Group (LIT), Boulder, Colorado

September 2019 – May 2022

Member

- Discussed position recommendations by reviewing current market events and financial news
- Analyzed market trends and patterns to expand financial literacy and study key investment strategies

SKILLS AND ADDITIONAL INFORMATION

- Advanced skills in Microsoft Word, PowerPoint, & Excel (dynamic financial modeling, pivot tables, complex formulas)
- Completion of Financial Modeling & Valuation Analyst course from Corporate Finance Institute
- Completion of Bloomberg Market Concepts course
- Intermediate Python skills (data structures, dataframes, functions, file reading & writing, familiarity with pandas and NumPy)
- Intermediate SQL skills (advanced joins, in-line views, familiarity with Google BigQuery and DataRobot)
- Completion of Alteryx Designer Core Certification