

Hitali Kothari

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EDUCATION

Beloit College

Beloit, WI

Bachelor of Arts in Quantitative Economics, Math; Study Abroad: Lingnan University (Hong Kong) Fall Graduation Date: May 2024; Major GPA: 3.7

RELEVANT SKILLS

Certifications: CFA Level 1 (February 2026), Wall Street Prep- Financial & Valuation Analyst (August 2025), CAIA

Fundamentals of Alternative Investments (Feb 2024), Series 7 (May 2024)

Fellowships: Morgan Stanley, US Bank, ORIX Financial, Kayne Anderson

Skills: STATA, Excel, Power BI, Python, Bloomberg, Regression Modeling, Accounting, Valuation, Financial Modeling

WORK EXPERIENCE

Belen Partners

Beloit, WI

Investment Analyst Intern- Healthcare

Jun 2025 - Present

- Sourced and analyzed 50+ healthcare companies; advanced 3 into active diligence through service quality, risk, and scalability assessment.
- Built and audited financial statements and P&Ls to support valuation models used in investment committee reviews.
- Developed LBO and comparable valuation models; drafted investment memos that informed internal deal prioritization and decision-making.

Associated Bank- WomenVenture

Minneapolis, MN

Lending Intern

Jun 2025 - Sep 2025

- Evaluated loan applications for women-owned small businesses using financial analysis and credit metrics.
- Prepared 6+ underwriting memos for the lending committee, influencing credit decisions and improving portfolio quality.
- Streamlined client onboarding through Lenderfit and Power BI, reducing loan processing time by 20%.

Cervano Capital

Remote

Private Equity Analyst Intern

Jan 2025 - May 2025

- Evaluated 22 industrial and distribution companies, leading to 4 IOIs and 1 LOI through valuation comps and market analysis.
- Built EBITDA reconciliations and supported the deal team with CRM tracking of 75+ opportunities.

RESEARCH EXPERIENCE

Portfolio Optimization for Healthcare Investing

Beloit, WI

Undergraduate Math Research- Beloit College

Aug 2025 - Present

- Designing a 3-factor optimization model integrating risk, return, and impact metrics for healthcare investing.
- Applying econometric testing to identify efficiency trade-offs in socially responsible portfolios.

Driving Change: State Policies Affecting EV%

Beloit, WI

Undergraduate Economics Research – Beloit College

Jan 2025 - May 2025

- Used multivariate regression to measure EV adoption drivers, finding incentives raised adoption by 92%.
- Quantified effects of fuel prices and infrastructure accessibility on state-level adoption rates.

LEADERSHIP EXPERIENCE

NCAA D-III Lacrosse Athlete

Beloit, WI

Beloit College

Aug 2023 - May 2024

- Midfield and defense for my college lacrosse team, and we proudly reached the Midwest Finals in Spring 2024.

Finance Club

Beloit, WI

Executive Board

Jun 2023 - Present

- Led peer discussions and workshops on investing, valuation techniques, and market trends.