

# PRIYAM PATEL

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## SUMMARY

Detail-oriented, analytical and responsible team player with a keen interest in studying and pursuing financial literacy. A major passion for investment research and analysis, due diligence, preparing financial models and valuations, understanding the key industry growth drivers, and enthusiasm to find answers by diving deep into the problems.

## EDUCATION

**University of Indianapolis**  
Bachelors of Science Finance 2021  
- Minor in Economics  
- Overall GPA - 3.7/4.0

Aug. 2017 - May 2021

## EMPLOYMENT

**CREA LLC**, *Analyst*, Indianapolis, Indiana

Oct. 2021 - Current

- Working closely with acquisition team to acquire financial data from developers, analyzing and comparing developer's financial with internal portfolio, performing due diligence as needed, preparing the financial models and running sensitivities.
- Analyzing key industry metrics such as DCR/ECR, occupancy, cap rate, cash flow PUPY(per unit per year), operating expenses etc to help the investment committee to make informed decisions and helping the company to realize the goal of providing affordable housing across America.

**Blackmore Partners Inc**, *Private Equity Business Development Intern*, Indianapolis, IN

Dec. 2020 - Apr. 2021

- Worked in a team led by our managing director on a deal that included the acquisition of a company with a \$100 - \$500 million revenue range. This process includes brainstorming client's needs, researching companies using Pitchbook and D&B Hoovers, sorting the list, and sending it for feedback to the client, preparing PowerPoint, and presenting.
- Day to day activities included M&A deal research, Deal Sourcing, Industry research, Company research, Due diligence, and CRM responsibility, Capital raising and Campaigns.
- Organized and assisted through hosting PE conferences and Executive meetings, performing extensive research on target companies, and developing acquisition proposals.

**Indy Tax Service**, *Finance and Tax Intern*, Indianapolis, IN

Jan. 2020 - Apr. 2020

- Dealt with financially crucial matters under supervisor, prepared taxes, research tax laws, and answered client queries.
- Learned to advise clients on tax planning and assist with reporting complicated foreign assets and income.

**Event Services, University of Indianapolis**, *Office Assistant*, Indianapolis, IN

Jan. 2018 - May 2021

- Assisted Business Operations Manager in planning, organizing, coordinating, and implementing the events successfully.
- During my time, We managed to establish a reputable position which increased the demand for off-campus events by almost 2 times.

**International Office, University of Indianapolis**, *International Student Ambassador*, Indianapolis, IN

Apr. 2019 - Dec. 2019

- Assisted in organizing the confidential documents and performed data entry tasks, hence ensuring accuracy.
- Helped peers and advisors to solve challenges faced by international students.

**Dharti Infrastructure**, *Financial Analyst Intern*, Ahmedabad, India

May 2017 - July 2017

- Worked with CFO in preparing project financial proforma, raising funds, preparing and analyzing financial statements, preparing the budget reports, forecasting statements, and preparing annual reports for the investors.
- Presented an idea of collaborating with local banks and insurance companies, which eased customers in getting loans and insurance documents. Resulting in an increase in the investment rate of return to 3 times.

**Shyam Shikhar Restaurant**, *Accounting Intern*, Ahmedabad, India

Apr. 2015 - June 2015

- Worked with Accountant and Operations Manager on comparing and analyzing financial statements (YOY), finding the cause of declining revenue, market research, identified cost-saving techniques, and prepared financial model.
- Redefined the business model, which increased the profit by nearly 10% annually.

## PROJECTS

Business Analyst TechPoint S.O.S. Challenge Participant

June 2020 - July 2020

- In a group effort, we identified the transportation problems faced by riders and IndyGo in the Indianapolis area due to Covid-19, then analyzed potential solutions.
- Performed extensive market research, contacted experienced professionals, conducted environmental analyses, and surveyed the users to reach the depth.
- Collaborated with tech members on the team, in the successful development of an application.
- Delivered and presented a business proposal to SME's and judges, gave a strong and competitive fight against other teams

Portfolio Management - Academic Project

Jan. 2020 - Apr. 2020

- Worked in a group for analyzing different equity to maximize return and reduce the risk exposure, wrote investment thesis on Industry Analysis, Company Analysis, and Merger and Acquisition.
- Prepared company valuation model using Excel to identify whether a stock is undervalued or overvalued.
- Presented in front of industry experts and answered their queries.

2019 NAIOP Case Study Competition, Broad Ripple High school Project

Sept. 2019 - Nov. 2019

- Learned the market demand and created the highest and best use report.
- Analyzed and generated the Financial Proforma and market feasibility report for the project.
- In the final round, our group presented the project proposal in front of city developers and ended in second place.

## AWARDS

**2019 Joan V. Persell Scholarship winner**, *School of Business, University of Indianapolis*  
- Awarded for being outstanding student in the field of finance.

Apr. 2019

## VOLUNTEERING

**UIndy Real Estate Club**, *Vice President*, Indianapolis, IN

Aug. 2020 - Current

**University of Indianapolis**, *School of Business Mentor*, Indianapolis, IN

Sept. 2020 - Dec. 2020

**University of Indianapolis**, *Interfaith Leader and Scholar*, Indianapolis, IN

Aug. 2018 - Dec. 2019

**Narcotics Control Bureau of India**, *Group Member*, Ahmedabad, India

June 2016 - Apr. 2017

## CERTIFICATIONS AND ACHIEVEMENTS

Bloomberg Certified

Apr. 2020

University of Indianapolis - Dean's list

2017 - 2021