

# Zachary “Ziggy” Lee

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## EDUCATION

### Lehigh University

*Bachelor of Science in Business and Economics*

Major: Finance, Minor: Computer Science

**Bethlehem, PA**

*Expected Graduation: May 2024*

**Major GPA 3.3/4.0**

**Relevant Coursework:** Data Science for Finance, Advanced Financial Modeling, Startup and Venture Capital Finance, Investments, Corporate Finance, Derivatives and Risk Management, Financial and Managerial Accounting, Business Analytics, Object Oriented Programming, Data Science, Web Systems Programming, Survey of Artificial Intelligence, Business Information Systems

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## PROFESSIONAL EXPERIENCE

### Private Equity Analyst, *Alchemy Capital Partners LLC, New York, NY (Remote)*

June 2023 - Present

- Private Equity firm based in New York, NY focusing on residential services consolidations and recession-resistant strategies
- Conducted research on hundreds of small to mid-sized prospective acquisitions resulting in four successful acquisitions
- Performed in-depth industry studies to identify untapped prospective investments leading to strategic portfolio diversification
- Completed intensive courses in Excel financial modeling, PowerPoint presentation skills, and OneDrive collaboration

### Research Assistant, *Lehigh University, Bethlehem, PA*

December 2022 - June 2023

- Conducted research under the guidance of Prof. Jesus Salas on the impact of corporate director replacements on firm value
- Compiled and analyzed more than 1000 corporate director replacement cases sourced from 8-K and DEF 14A filings.

### Data Analytics Intern, *OneMain Financial (NYSE: OMF), Charlotte, NC*

June 2022 - August 2022

- Integrated Heap Analytics for mobile apps, unlocking actionable user behavior patterns insights on endpoint clicks
- Increased conversion rate from 89% to 93% of online applicants through the implementation of streamlined processes
- Created advanced SQL queries and Excel formulas to profile user behavior and credit risk for the pre-application process
- Leveraged SQL data analysis to pinpoint user confusion, saving customer support costs through application enhancements
- Presented to C-Suite executives on the discovery of sticking points and their fixes, which boosted client conversion rates

### Sales Intern, *Millennium Advisors LLC, Charlotte, NC*

May 2021 - August 2021

- Thrived in a fast-paced work environment, showcasing strong technical skills in Excel, SQL, and proprietary software
  - Collaborated closely with the trading, quantitative, and programming teams for efficient cross-functional teamwork
  - Completed a week-long training intensive led by quantitative analysts and traders on Python for financial modeling
  - Learned about market-making and risk management techniques by shadowing traders throughout the trading day
  - Tasked with CRM, platform enablements, producing growth opportunity assessments, and assisting with EoQ reports
  - Assisted traders with liquidity and pricing research on tickers utilizing SQL, Bloomberg, MarketAxess, and TradeWeb
  - Saved \$120,000 through analysis of historical trading data, resulting in the discovery of bad actors within counterparty firm
  - Presented to C-Suite and traders on improvements to proprietary software and their interaction with databases
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## LEADERSHIP AND ACTIVITIES

### Vice President of History (Zeta), *Chi Phi Fraternity, Lehigh University*

October 2022 - April 2023

- Responsible for the continuation of record-keeping for the oldest continuous Chi Phi chapter, founded in 1872

### Club Member, *Investment Management Group, Lehigh University*

January 2021 - Present

- Club of undergraduate students meeting weekly to pitch stocks and manage a portfolio of over \$150,000

### Club Member, *Lehigh Men's Club Soccer, Lehigh University*

September 2021 - Present

- Competitive soccer club practicing twice a week and playing once in a league of northeastern colleges and universities
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## SKILLS AND INTERESTS

**Computer:** Excel (advanced), SQL (intermediate), Heap (intermediate), R (intermediate), Java (intermediate), Python (intermediate)

**Office:** Microsoft Office, PowerPoint, Access, Bloomberg, OneDrive

**Interests:** Premier League Soccer, Formula 1, Chess, Golf, Poker