**Sean Adams**

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**Education**

**Bentley University,** Waltham, MA August 2011-May 2015

Bachelor of Science, Finance

Minor: Mandarin Chinese

GPA: 3.31; Dean’s List (Fall 2011, Spring 2013, Fall 2013, Spring 2014)

**Universitat Pompeu Fabra,** Barcelona, Spain August 2013-December 2013

Study Abroad Program

Studied Spanish Language, International Product Management, and Pricing Policies

**Professional Experience**

**Green Vault Partners,** Boston, MA August 2015-Present

*Acquisition Analyst Intern*

* Independently researched and analyzed privately held companies based on investment criteria for potential acquisition
* Built financial models, analyzed financial statements and projected earnings; created peer benchmarks for qualitative evaluation
* Evaluated Confidential Information Memorandums

**Richard Miller & Associates an Ameriprise Private Wealth Advisory Practice,** Wellesley, MAOctober 2014-February 2015

*Private Wealth Management Intern*

* Maintained client profiles, meeting notes, and office schedule for client portfolio
* Appointed as Lead Client Service Packet Intern, and updated processes to more effectively convey valuable client information
* Researched mutual funds and calculated optimal portfolio allocation for advisor approval

**Commonwealth Financial Network,** Waltham, MA June 2014-August 2014 *Cashiering/Retirement Operations Intern*

* Set up EFT, wire and journal payments, managed between 500 to 800 transactions a week, ranging from $1,000 to $100,000
* Researched unclaimed stock certificates for clients holding unclaimed property

**Relevant Coursework**

**Capital Markets,** Portfolio Project Spring 2015

* Compiled research portfolio consisting of debt securities, indices and currency futures, and tracked prices and yields
* Researched each security to understand variances 0069n price and yield, and predict future prices
* Calculated 10 Year Treasury hedge for portfolio consisting of corporate bonds to minimize losses due to a predetermined change in basis points

**Financial Modeling,** Financial Statement Forecasting and ValuationFall 2014

* Analyzed Panera’s 10-K over five years to determine model parameters and projected income statement and balance sheet
* Modeled DCF over 5 years based on Panera’s WACC to determine the share price and issued company hold recommendation

**Leadership and Activities**

**Bentley Investment Group** 2014-2015

* Participated in management of the $825,000 student-run portion of the University’s endowment

**Alpha Gamma Pi Fraternity** 2012-2014

* Greek Activity Council and Interfraternity Council representative: Negotiated with Greek governing bodies to organize campus wide events
* Philanthropy Chair: Worked with and set up fraternity events on campus to raise money for local YMCA

**Bentley Intramural Soccer Team** Fall 2012, Fall 2014

* Captained team by organizing weekly practices and matches, as well as ensuring all team members attended events

**Volunteer Work**

**Debra Adams Memorial Gold Tournament** Summer 2010-Present

* Organized and managed a golf tournament and fundraiser for students suffering financial difficulties through adverse life events

**YMCA** Fall 2012-Spring 2014

* Organized Halloween children’s event, and participated in the Waltham elementary after school program

**Technical Skills**

**Training the Street** September 2015

* Completed Excel Modeling and Financial Modeling courses

**Pillars of Wall Street**, Waltham, MA February 2015

* Completed intensive seminars in: Fundamentals of Valuation, Introduction to Excel, and 3 Statement Financial Modeling