

Charles Liu

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PROFESSIONAL EXPERIENCE

Balyasny Asset Management | Self-Employed Investor

New York, NY

(Balyasny) Investment Associate | (Self-Employed) Portfolio Manager

November 2020 – Present

- **Balyasny:** Sourced, researched, and executed long/short equity investments in internet and software stocks for \$250mm portfolio within \$9bn+ multi-strategy hedge fund. Left fund to manage own equity long/short portfolio
- **Self-Employed (Present):** Actively manage personal long/short equity portfolio of 30+ internet, software, media, telecom, healthcare, and retail stocks to achieve 150%+ realized annual total return across holdings (excluding meme stocks, crypto)

Goldman Sachs

New York, NY

Investment Banking Associate—Structured Finance (early Associate-promote)

September 2019 – November 2020

- Closed \$2.4Bn+ of deals. Role entailed two businesses: (1) Advising clients on, structuring, and executing esoteric asset-backed financings, and (2) Co-evaluating potential structured investing opportunities with the Principal Funding & Investments (PFI) principal investing group in Securities Division. Automated models and workflows
- Selected Transaction Experience (Advisory):
 - **SORT 2020-1:** Executed \$2.0Bn+ first-of-its-kind esoteric ABS transaction collateralized by 11 industrial fulfillment and distribution centers leased to Amazon via long-term triple-net leases (largest triple-net lease ABS transaction to date)
 - Coordinated structuring, appraisal, marketing, and closing processes for innovative securitization structure
 - Evaluated multiple scenarios to arrive at optimal portfolio monetization economics for sponsor
 - Guided conversations with senior management to successfully put in place inaugural, scalable master trust platform
- Selected Transaction Experience (Principal Investing):
 - **Leading Private Equity Firm (name retained):** Evaluated potential \$300mm secured loan backed by all current and future GP carried interest assets
 - Built bottom-up, dynamic asset model consolidating carry from (1) existing investments, (2) uncalled commitments, and (3) future funds to analyze and sensitize collateral cash flows under various return and carried interest regimes
 - Collaborated with PFI to draft indicative term sheet for loan investment that achieved acceptable return, amortization, and structural protections while also satisfying borrower's quantum and cost of funding needs
 - Coordinated meetings and negotiations with borrower amid evolving private equity landscape and market backdrop

Goldman Sachs

New York, NY

Investment Banking Analyst—Liability Management/Debt Restructuring

July 2017 – August 2019

- Closed \$90Bn+ of deals. Advised clients on, structured, and executed debt restructurings across TMT, CRG, HC, IND, NR, FIG, and RE industries as well as sovereigns in the context of M&A, distressed situations, spins, splits, divestitures, asset sales, internal reorganizations, and refinancings. Automated models and workflows; received early Associate promotion

PROJECTS

Online Shopping Platform App (name retained; work-in-progress)

New York, NY

- Currently creating one-stop online shopping platform web and (future) iOS apps involving both eCommerce and creator economy components. Conducting market research, developing business plan, and building codebase using combination of Python/Flask, Heroku, PostgreSQL, and HTML/JS/CSS/Chrome technologies

Social Investing Platform App (name retained; work-in-progress)

New York, NY

- Currently creating social investing web app injecting gaming elements into traditional retail stock investing. Beginning to conduct market research, develop business plan, and build codebase using combination of technologies

EDUCATION

Rutgers University—Full Ride Presidential Scholarship

New Brunswick, NJ

Dual Degree in Computer Science & Economics

September 2013 – May 2017

- **GPA:** 3.6 / 4.0 | **SAT:** 2350 / 2400

SKILLS, CERTIFICATIONS & INTERESTS

Languages: Native speaker of English and Mandarin Chinese

Skills, Certifications & Training: Python, Java, C, SQL, HTML/JS/CSS, VBA, Series 79, Series 63, Microsoft Office

Interests: Exploring unfamiliar places, investing, watches, film, video games, space exploration, trying new foods/cooking