

WORK EXPERIENCE

Francisco Partners Consulting

Atlanta, GA

Summer Analyst & Analyst – Financial Institutions Group

Dec 2018 – Present

- Project manager on an ongoing IPO process for a leading security SaaS company
- Manage weekly breakdown of all portfolio companies in terms of liquidity, potential COVID ramifications, sale processes and other key details
- *Interim Sales Operations Associate* focused on pipeline management and revenue forecasting

Bank of America Merrill Lynch

New York, NY

Summer Analyst & Analyst – Financial Institutions Group

Summer 2016, Jun 2017 – Dec 2018

- Created management presentations, CIM and pitch presentations for insurance, depositories, financial technology, specialty finance and asset management clients
- Evaluated potential M&A opportunities through accretion dilution analysis and perform precedent transaction/ comparable company analyses in Excel

Selected Transaction Experience:

- *QBE Insurance Group sale of its Latin American operations to Zurich Insurance Group for \$409 mm (announced)* – Communicated with executives from more than 5 divisions (countries) to create a business and financial summary as well as financial projections and valuation for this part of the firm’s business while actively managing the data room with over 9,000 documents and a diligence tracker with over 5,500 diligence requests
- *CoBiz Financial sale to BOK Financial for \$977mm (announced)* – Created accretion / dilution merger model and calculated intrinsic value of client using a dividend discount model while analyzing precedent transactions and comparable valuation metrics

EDUCATION

Boston College – Carroll School of Management

Chestnut Hill, MA

Bachelor of Science in Management concentrating in Accounting & Finance with a French minor

Class of 2017

- Cumulative GPA: 3.535/4.0

ESCP Europe – Paris Campus

Paris, France

Study Abroad Semester

Aug 2015 – Dec 2015

Hong Kong University of Science & Technology

Clearwater Bay, Hong Kong, China

Study Abroad Semester

Jan 2016 – May 2016

LEADERSHIP

Carroll School of Management

Chestnut Hill, MA

Peer Advisor

Sep 2016 – May 2017

- One of ten seniors selected to serve as a student advisor to all Carroll School of Management students
- Critiqued resumes, cover letters and answered all questions relating to recruiting or being a BC student for more than 1,200 students

Boston College Men’s Crew Team

Chestnut Hill, MA

Team Member & Social Chairman

Sep 2013 – Mar 2017

- “*Boston College Lightweights Class of 2002 Most Improved Rower*” in 2015
- Two time *New England Rowing Champion*
- Organized a formal for six different club sports teams in fall of 2016

OTHER INFORMATION

Languages: Conversational Proficiency in French

Modeling: Completed BofAML’s formal “Financial Edge” Training

Computer: Expert in Microsoft Office (Excel, PowerPoint, Outlook and Word), Javascript, HTML, CSS, Node.js

Certifications: FINRA Series 79 & 63

Interests: Telluride, CO., Atlanta Falcons & Braves fan, *Game of Thrones*, *Succession*