

David Wesley Lewis Jr.

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Education:

Cleveland State University Fall, 2015 – May 2019. **Bachelor's of Finance.** GPA of 3.67.
Graduated Magna Cum Laude.

Experience:

PNC Financial Services Group (Phoenix, Arizona) Portfolio Manager – *Corporate & Institutional Banking* (January 2022 – Present)

- Conduct comprehensive financial analysis to evaluate credit opportunities across diverse industries within the emerging middle market space.
- Collaborate closely with cross-functional deal teams, including relationship managers, underwriters, and legal counsel, to navigate the lifecycle of client relationships from onboarding to closure.
- Provide clients with consultative services, specifically in expense management, senior and subordinated debt acquisition, capital structure optimization, mergers and acquisitions, and partner buy-outs
- Forge partnerships with product specialists in treasury management, foreign exchange, derivatives, and merchant services to deliver holistic commercial banking solutions to clients.
- Oversee a portfolio of 200+ relationships, managing \$130 million in credit exposure within the Phoenix Emerging Middle Market.

Western Alliance Bancorporation (Phoenix, Arizona) Corporate Banking Development Associate & Credit Analyst - *Equipment Finance, Homebuilder Finance* (August 2019 – January 2022)

- Execute front-line credit administration tasks, including financial spreading and credit covenant testing, to ensure the soundness of commercial lending operations.
- Assess the creditworthiness of prospective borrowers and monitor the financial performance of existing clients to mitigate risks. (**formal credit training received**)
- Prepare comprehensive loan presentations and modifications in the equipment finance and commercial real estate sectors.
- Supervise a portfolio comprising \$600 million in aggregate commercial real estate commitments and develop portfolio management models to optimize performance.

Boyd Watterson Asset Management (Cleveland, Ohio) Research Analyst Intern – *Real Estate Team* (December 2018 – May 2019)

- Generate preliminary reports assessing the investment viability of various regions in alignment with the firm's real estate investment strategy.
- Analyze rental statistics of properties leased by government entities to identify trends, anomalies, and investment opportunities.
- Evaluate capital expenditure plans and strategic budgets of federal, state, and local governments to inform investment decisions.
- Utilize financial modeling techniques to forecast and monitor the profitability of commercial properties.

Additional Awards, Certifications and Organizations:

- Cleveland State University Dean's list (all semesters of undergrad)
- Cleveland State University Financial Management Association (FMA)