

# Allison Rosenberg

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An Investment Banker with seven years of experience, specializing in equity research, strategic investing, and financial modeling. A strong history of performing due diligence on investment opportunities to maximize ROI potential for high-net-worth clients,

## Education

### Bachelor of Science (B.S.)

#### Economics

University of San Francisco,  
San Francisco, CA  
September 2011 - May 2015

## Key Skills

- Investment Banking
- Financial Analysis
- Economics
- ◆ Client Relations
- ◆ Portfolio Management

## Certifications

- Series?, FINRA, 2015
- Series 63, FINRA, 2015
- ◆ Series 65, FINRA, 2015

## Professional Experience

### Investment Banker

Johnson and Goldman Inc., San Francisco, CA | October 2017 - Present

- Develop financial models and investment strategies for client portfolios valued at \$300K-\$1M and provide recommendations for valuations, M&A, and product offerings
- Conduct equity research, identify long-term investment opportunities in companies with best-in-class management teams and business models, and recommend investment opportunities in businesses committed to solving complex customer problems
- Conduct in-depth valuations of intangible assets for purchase price allocations by evaluating income, market indicators, and company financials

### Investment Banker

Invest Today Inc., San Francisco, CA | May 2015 - October 2017

- ◆ Performed financial analysis and determined valuations for startup technology companies, which included providing recommendations to investors on business based on economic data, product use case, and organizational effectiveness
- Created in-depth financial models using data and long-term market indicators to inform investment decisions and establish long-term ROI potential