

# Ian Zhang

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## EDUCATION

### University of California, Los Angeles (UCLA)

*Bachelor of Science in Statistics and Data Science*

**Los Angeles, CA**

*Expected Jun 2025*

- *Academics and Honors:* GPA: 3.76/4.0, Dean's Honor List, ACT: 35, SAT: 1510
- *Relevant Coursework:* Statistical Models in Finance, Data Mining, Machine Learning, Optimization, Linear Algebra
- *Accomplishments:* UCLA UBS Investment Banking Workshop, 2023 Credit Suisse LBO Case Competition (1st Place)

## PROFESSIONAL EXPERIENCE

### Santander

*Incoming Investment Banking Analyst*

**Los Angeles, CA**

### Santander

*Investment Banking Summer Analyst — Financial Sponsors, Leveraged Finance, & REGAL*

**Los Angeles, CA**

*Jun 2024 — Aug 2024*

- Santander LA is led by the former Financial Sponsors and REGAL group heads of Credit Suisse LA

#### Selected Transaction Experience:

##### **Project Hawkeye - \$200mm TLB greenfield financing for casino gaming enterprise (In process)**

- Assisted on 60+ page LP detailing industry/company overview, investment thesis and target market opportunity
- Performed market analysis on the TAM and competitors in the serviceable region of the greenfield project
- Analyzed recent gaming debt issuances for market clearing rates and pricing at indicated leverage and ratings
- Built debt paydown and FCF model and incorporated ECF sweep thresholds to reflect leverage covenants

##### **Calderys (Platinum Equity) - \$300mm PIK toggle notes for industrial thermal protection enterprise (Closed)**

- Drafted the industry/company overview, current cap and sources & uses for internal committee memorandum
- Constructed paydown model to determine debt paydown capacity and to ensure paydown was over 50%
- Analyzed recent industrial debt issuances for market clearing rates and pricing at indicated leverage and ratings

##### **Final project - Strategic alternatives for Box, Inc.**

- Explored strategic alternatives for Box, Inc., constructed deck with detailed models and specific growth strategies
- Built LBO and merger model with personal assumptions on company growth and synergies based on comparables
- Identified industry headwinds as opportunity for low purchase price, potential product offering expansion with roll-up acquisitions as well as strong fundamental product; achieved 20% base IRR, 91% debt paydown

### K1 Investment Management

*Private Equity Operations Summer Analyst*

**Manhattan Beach, CA**

*Jun 2023 – Aug 2023*

- Analyzed portfolio company's historical data to discern underperforming areas and provide growth recommendations
- Conducted industry due diligence in the B2B AI space and presented opportunities for potential areas of expansion
- Designed cross-functional systematic tool to track AR collection of ~\$10 million/month to verify collection initiatives

### Watertower Advisors

*Investment Banking Summer Analyst*

**Los Angeles, CA**

*Jun 2022 – Sep 2022*

#### Selected Transaction Experience:

##### **Project Alpha - sale of a \$5mm revenue music distribution company**

- Analyzed competitive landscape of SaaS music industry to develop and implement strategic growth opportunities
- Conducted research into portfolio companies of potential investors and developed rationale for strategic acquirers

## LEADERSHIP EXPERIENCE & ACTIVITIES

### Bruin Hedge Fund

*Senior Analyst*

**Los Angeles, CA**

*Oct 2022 – Present*

- Participated in a comprehensive 10-week training program which focused on accounting and valuation methodologies
- Pitched NYSE:V using DCF, public comparables and precedent transactions analysis for consideration to the club's fund
- Assembled stock pitch materials that highlighted investment thesis, financial analysis, company and industry overview

### International Business Fraternity of Delta Sigma Pi

*President, Director of Brotherhood*

**Los Angeles, CA**

*Jan 2022 – Present*

- Oversee recruitment process, weekly General Business Meetings, and duties of 20 Executive Committee members
- Coordinated industry workshops for university students and fraternity members to assist with their career preparation
- Managed executive board and fraternity members for record-breaking number of 180+ participants for 2023 recruitment

## ADDITIONAL

**Skills:** R, Python, Bloomberg, FactSet, Statistical Modeling, Financial Modeling, Fluent in English, Proficient in Chinese

**Interests:** Weightlifting, Chicago Sports, Ice Hockey, Legos, *Black Mirror*, *Interstellar*, J.Cole, NBA, Road Trips, Piano