

JONATHAN BAIRD

OUTDATED: TO BE UPDATED IN FUTURE

PROFESSIONAL EXPERIENCE

H.I.G. Capital

New York, NY

Associate, Bayside Capital

August 2017 – Present

- Alternative private equity strategy within H.I.G. Capital
 - Invested in companies undergoing operational turnarounds, financial distress, or other special situations
 - Industry generalist role required the ability to quickly learn business models across a variety of sectors, including technology, business services, retail, telecommunications, oil & gas services, semiconductors, and healthcare
- Performed 1-2 month of research and data analysis before making an investment
 - Analyzed financial statements, built a financial model, met with management, and held calls with industry experts
 - Created ~50 page document summarizing the opportunity and presented key portions to internal committee

Selected transaction experience:

- Project Transcript: \$100 million sale of legal services company
 - Analyzed spreadsheet of over 400,000 job orders to determine why profit margins were declining, discovering that a shift towards a lower-margin service channel was the primary driver
 - Performed various data cleansing methodologies on a database of over 5,000 customers in order to examine the revenue and profitability ramp of a typical new customer
- Project Debug: investment in \$3 billion Caribbean telecommunications operator
 - Built a detailed Excel-based financial model to predict the company's future cash flows and continuously refined the model with new data in order to improve accuracy
 - Analyzed exchange rates and GDP trends in each key market in order to make informed investment decision

BMO Capital Markets

OUTDATED

New York, NY

Investment Banking Analyst, Technology & Business Services Group

July 2014 – July 2017

- Advised corporate clients on over 10 initial public offerings, mergers & acquisitions, and debt financings
 - Clients often relied on our consultative guidance, due to their inexperience in consummating such transactions
 - Focused on the technology and business services sectors, with emphasis on the EdTech and FinTech verticals
- Supported sales team leaders in prospecting new business opportunities and formulating responses to RFPs
 - Pitches often involved ~40 page "bakeoff" presentations highlighting the differentiating aspects of our firm
 - Received 1st tier ranking during all 3 years, indicating top 10% performance within analyst class

Selected transaction experience:

- Project Euclid: \$50 million growth equity raise for education technology company
 - Built an Excel database of venture capital funding activity within the EdTech market, used by sales leaders to focus business prospecting on high likelihood opportunities; resulted in the win of a ~\$50 million mandate
 - Created a detailed memorandum outlining the key investment highlights of the company, such as a highly scalable technology platform which allowed for profitable unit economics
- Project Centurion: \$200 million IPO of payment services company
 - Worked directly with CFO to build a financial model for use by prospective equity and debt investors, forecasting revenues, expenses, and working capital individually across the company's 8 facilities
 - Drafted the S-1 filing, positioning the business opportunity of a conversion from magnetic stripe to EMV cards

EDUCATION

Goizueta Business School, Emory University

Atlanta, GA

Bachelor of Business Administration: Concentrations in Finance & Accounting

May 2014

- Cumulative GPA: **3.91/4.00**; SAT Math: 770; SAT Verbal: 770
- Graduated with High Distinction (top 10% of class); Beta Gamma Sigma honor society; Dean's List, all semesters
- Study Abroad, Fall 2012: Vienna University of Economics and Business

ADDITIONAL INFORMATION

Interests: Traveling abroad; NBA; NFL; Fantasy football

Skills: Proficient in Microsoft Excel, PowerPoint; beginner-level in Python; some knowledge of SQL