

Evelyn Carter

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Target Field: Finance

PROFILE

Investment Analyst with experience delivering measurable outcomes in Finance. Strong in execution, clear communication, and building systems that scale. Comfortable owning work end-to-end and collaborating across teams.

EDUCATION

NYU Stern
B.S. Finance

Los Angeles, CA
2021 — 2025

- Coursework: Systems, Research Methods; GPA: 3.7/4.0 (synthetic)

EXPERIENCE

Investment Analyst — Cobalt Partners

Austin, TX | Sep 2023 — Present

- Delivered a cross-functional initiative; improved a key metric by 12% through iteration and better tooling.
- Created dashboards and recurring reporting; reduced decision turnaround time by 50%.
- Standardized processes and documentation; cut manual effort by 65% and improved consistency.
- Partnered with stakeholders to define requirements, align on scope, and deliver on schedule.

FP&A; Analyst — Juniper Analytics

Philadelphia, PA | Jul 2021 — May 2023

- Automated a cross-functional initiative; improved a key metric by 12% through iteration and better tooling.
- Created dashboards and recurring reporting; reduced decision turnaround time by 40%.
- Standardized processes and documentation; cut manual effort by 55% and improved consistency.

Intern — Harborview Investments

Phoenix, AZ | Jun 2019 — Jun 2021

- Improved a cross-functional initiative; improved a key metric by 27% through iteration and better tooling.
- Created dashboards and recurring reporting; reduced decision turnaround time by 30%.
- Standardized processes and documentation; cut manual effort by 45% and improved consistency.

PROJECTS

Operating Forecast Model

- Built a rolling forecast model with scenario analysis and sensitivity tables.
- Automated monthly refreshes and improved narrative reporting.
- Presented results to stakeholders and documented next steps.

Valuation Case Study

- Completed DCF + comps for a mid-market company and wrote an investment memo.
- Stress-tested assumptions and summarized key risks.
- Presented results to stakeholders and documented next steps.

Spend Controls Dashboard

- Created a dashboard to monitor spend vs. budget and flag anomalies.
- Improved visibility for leadership and finance partners.
- Presented results to stakeholders and documented next steps.

SKILLS

Skills: Excel, Stakeholder updates, Risk metrics, PowerPoint, Variance analysis, Forecasting, SQL basics, Financial modeling, Budgeting, Valuation

Certifications: CFA Level I (In Progress), FMVA (In Progress), Bloomberg Market Concepts (BMC)