JOE SCHERMER

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EXPERIENCE

Self-Employed   **New York, NY**
Various   *April 2020 – present*

- Freelance consulting for technology startups, advising on business models and strategic positioning
- Assistant to video artist Andrew Norman Wilson on This Light, a video archiving and curation project
- Census Enumerator during Fall 2020, door knocking and recording respondent answers in Brooklyn, NY

CapFi Partners LLC   **New York, NY**
Investment Banking Analyst   *December 2018 – March 2020*

- Boutique advisory firm spun out of Credit Suisse's software investment banking group
- Specialized in capital raising, M&A advisory and strategic consulting for technology companies
- Sole analyst responsible for qualitative and quantitative analyses on behalf of corporate and startup clients
- Created detailed bottom-up financial models and designed presentations using Excel and PowerPoint
- Led due diligence efforts on 10+ prospective clients, evaluating management teams and financial details
- Read and summarized 2,000+ pages of Wall Street equity research reports for use by senior bankers
- Developed original industry research in support of client fundraising efforts and internal company goals
- Devised internal business plan, including market positioning, branding strategy and competitor analysis
- Managed senior bankers' calendars, including scheduling calls and coordinating stakeholder meetings

Oberlin College Department of Economics   **Oberlin, OH**
Research Assistant   *January 2017 – May 2018*

- Managed and cleaned longitudinal dataset of over 700,000 firms and 600 variables spanning 40 years
- Selected relevant information from original Indonesian manufacturing firm survey data and reports
- Created thematic variable sets related to labor expense and energy use in complete time series using Stata
- Independently built longitudinal dataset of all U.S. city population figures from 1870 to 1900
- Manually input and double-checked 20,000+ data points in Excel using archival U.S. Census documents

Clarence Ward Art Library   **Oberlin, OH**
Digital Resource Manager, Circulation Assistant   *August 2016 – May 2018*

- Spearheaded a project to optimize and reorganize library's website, digital archives and online resources
- Migrated all website files to a new CMS and manually cleaned and reformatted all webpage HTML/CSS
- Established digital resource management best practices and continuity standards for future employees
- Prepared course material for professors, including finding written materials and scanning book selections
- Planned periodic art exhibits in collaboration with head librarian, selecting works and setting up displays
- Assisted library patrons, operated book cataloging software and maintained printers and other equipment

Irvin E. Houck Center for Information Technology   **Oberlin, OH**
Networking Technology Assistant   *February 2016 – February 2017*

- Worked with administrators and technicians to maintain college copper and fiber optic data networks
- Troubleshot network hardware and software issues, performing on-site maintenance as needed
- Traced sources of network disruptions and determined proper routing for new connections
- Repaired broken cables and punched down Cat5e/Cat6 ethernet cable jacks using specialized tools

EDUCATION

Oberlin College of Arts and Sciences   **Oberlin, OH**
Bachelor of Arts: Major in Economics, Minor in Politics   *August 2014 – May 2018*

ADDITIONAL INFORMATION

Proficiencies: Software: Excel, PowerPoint, Word, Stata, HTML/CSS, Adobe Creative Suite, Final Cut Pro
                   Data: Bloomberg Terminal, Capital IQ, Pitchbook, Preqin, FactSet, SEC EDGAR

Licenses: FINRA Series 7, 63, 79; Securities Industry Essentials (SIE), Bloomberg Market Concepts

Interests: Independent film, new media, shade gardening, jazz piano, swimming