

TAEK KEVIN LIM

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WORK EXPERIENCE

Westwicke Partners

Analyst

San Francisco, CA

March 2017 - Present

- Assist senior management, advising 2 private companies through the IPO process, including pitch books
- Cover industry/sector news and manage information flow to companies in the MedTech, Life Sciences, and Diagnostics
- Maintain 5 different consensus models on company valuations from sell-side analyst research
- Prepare company quarterly earnings and other events by drafting call scripts, press releases, and assisting with related logistics

Amerigo Capital / Concert Golf Partners

Private Equity Intern

Irvine, CA

October 2015 – August 2016

- Research qualifying investment opportunities respective to the market with a deal flow consisting of \$1 - \$30 million EBITDA companies, leading to 4 deals in 3 months and reaching out to 400+ board members per month
- Run financial analysis, valuations, and modeling on opportunities while concurrently conducting due diligence procedures for prospective deals
- Analyzed business trends, competition, and potential strategic partners using information obtained from multiple data sources
- Assist Managing Partners and senior members in acquisition related efforts such as strategic rationale, synergy valuation, and target analysis

Deutsche Bank

Portfolio Account Analyst, Global Transaction Banking

Santa Ana, CA

September 2014 – October 2015

- Execute, analyze and monitor up to 15 portfolios in parallel worth \$4BN for institutional clients
- Interact with investors, custodian banks, and collateral managers on a daily basis to clarify investment strategy, execute trades, cash management and reconcile cash balance
- Produce relevant investment reports for portfolio performance and research discrepancies that might occur due to mismatch trade information, pricing issues, corporate actions or system processing

Titan Capital Management

Equities Analyst, Endowment Fund

Fullerton, CA

June 2013 – June 2014

- Managed endowment funds and delivered 21% return in 9 months on a portfolio based on fundamental stock analysis
- Managed 42 stocks in the portfolio from various industries in technology, healthcare and energy using market research
- Developed equity reports and investment materials for the Board of Trustees using industry research, forecasting, and valuation methods (discounted cash flow, comparable companies & transactions)
- Analyzed portfolio team's risk via attribution reports which decreased portfolio beta from 1.36 to 1.21 and subsequently avoided an 8% loss during market volatility

Orange County Transportation Authority

Funding Analyst Intern, Planning

Orange, CA

December 2012 – September 2014

- Budgeted and allocated \$200M+ in project finances in a timely manner for city agencies to receive funding
- Led multiple projects by collaborating with programming managers to improve efficiency in grant tracking database by developing an aging report and program application allowing an increase in payment accuracy by 30%.
- Reduced payment processing by 40%, or 61 days by designing, standardizing and consolidating forms and instructions

EDUCATION

California State University of Fullerton

Bachelor of Science in Business Administration; Finance Major

Fullerton, CA

May 2014

- Major GPA: 3.5/4.0
- Relevant Coursework: Corporate Finance, Fixed Income & Capital Markets, Mergers & Acquisitions
- Chief Fundamental Officer of Student Managed Investment Fund which outperformed S&P 500 with a beta of 0.69

ADDITIONAL SKILLS

Skills: Expert in Excel and Office, Bloomberg Terminal, Capital IQ, SQL, Salesforce, FactSet, Nasdaq IR