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WORK EXPERIENCE

PNC Capital Markets, Financial Institutions Group – Chicago, IL **Diversified Financial Institutions Senior Associate**

Apr 2022 – Present

Team of relationship managers specializing in the delivery of a wide range of capital markets solutions and advisory to diversified financial institutions (asset and wealth managers, broker-dealers, investment banks, etc.). Experience:

- Providing fund finance credit facilities, secured by committed capital or fund assets, across a broad range of strategies and asset manager types
- Being a thought leader by leading the weekly production of a digest on diversified financial institution data and news, distributed to over 100 internal partners and executives
- Leading prospecting efforts and conversations, including coordinating with internal partners and setting follow-up meetings as the main point of contact for the prospect
- Producing external investment banking and advisory content, showcased by delivery of market trends analyses and sell-side M&A project
- Strategic plan creation and execution, showcased by the development of coverage strategies and execution
- Process improvement and overall resourcefulness has resulted in several enhancements to how the team operates, tracks pipeline, manages client materials, and collaborates by utilizing SharePoint, Teradata queries, and Excel VBA

PNC Bank – Chicago, IL

Strategy Analyst (Rotational Program)

Mar 2021 – Mar 2022

Business Development team that supports business executives by curating and executing strategic initiatives including M&A, brand strategy, product build, economic data reporting, and regulatory / Board of Directors reports. Experience:

- Codifying and executing on the rebranding of the personal wealth business to PNC Private Bank
- Reporting market indicators to Retail executives on the unprecedented change in consumer behavior post-2020
- Creating an Excel and PowerPoint Add-In featuring various functions that improve team efficiency
- Reporting on FinTech M&A to inform asset management acquisition discovery
- Earnings analysis reporting for banking and payment / merchant processing peers
- Core team for executing the integration the \$11.6B BBVA acquisition

PNC Bank, Corporate Banking – Troy, MI

Corporate Credit Associate (Rotational Program)

Jun 2019 – Feb 2021

Assessing repayment risks of credit deals through qualitative and quantitative analysis based on financials, company profile, and industry data as well as working with deal teams to discuss structure, pricing, and exposure. Experience:

- Underwriting over 70 deals during 2020, along with various leadership, recruiting, and mentorship roles
- Monthly and quarterly development of executive sales reporting utilizing data manipulation skills
- Heavy involvement in various Paycheck Protection Program task forces
- Various Employee Diversity Equity and Inclusion group memberships, including leadership

SKILLS & INTERESTS

Skills: expert Excel modeler and PowerPoint creator, including VBA experience; data manipulation

Current Interests: snowboarding; traveling; breweries; programing; boating; *House of the Dragon*

EDUCATION

Grand Valley State University (“GVSU”) – Allendale / Grand Rapids, MI

Seidman College of Business: BBA in Finance

Class of 2019

Seidman College of Business: BBA in Economics – Real Estate Emphasis

GPA: 3.50

- Scholarship T&F / XC Athlete, Seidman Investment Portfolio Org., Economics Club & Student Advisory, Tutor

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