

Karna Patel

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EDUCATION

London Business School

London, United Kingdom | 2020 - 2021

Reading for Masters in Financial Analysis (MFA)

Ivey Business School, Western University

London, Canada | 2015 - 2019

Bachelor of Arts, Honors Business Administration (HBA), Graduated with Distinction

- GPA: 3.7/4.0; Dean's Honor Roll (2016, 2017)
- Selected Courses: *Financial Derivatives, Value Investing, Strategic Investing, Raising Capital, FinTech, Sustainable Finance*
- Transferred in 2017 from the Business Administration program at Wilfrid Laurier University

BUSINESS EXPERIENCE

FreshBooks, Corporate Development Analyst

Toronto, Canada | Jan. 2020 - Present

- Assisting with sourcing and executing strategic acquisitions as only junior member of three-person corporate development team.
- Conducting primary and secondary research to build acquisition strategies in four targeted growth areas; helping senior executives identify industry opportunities and develop a strong pipeline of industry relationships and acquisition targets.
- Evaluating targets on business models, financial statements, and strategic rationale to develop deal thesis for executive approval.
- Performing financial modelling and projections on targets to estimate valuation and potential acquisition consequences.
- Selected transaction experience:
 - Potential \$3M cross-border acquisition of a Latin American company in cloud accounting software space:
 - Built a precedent transactions analysis to estimate a valuation range; analysis reflected target required a 30% discount due to decline in tech acquisition multiples caused by the prevailing market conditions destabilizing price negotiations.
 - Analyzed different deal structure scenarios based on executive team preferences; resulted in acquisition structure alteration from 100% cash to equity, cash and earnout split to create a better incentive structure for acquired team.

CPS Capital, Private Equity Intern Analyst

Toronto, Canada / Remote | Jan. 2020 – Present

- Supporting deployment of CPS Capital's \$70M fund in targeted investments across select North American industries.
- Conducting primary and secondary research to validate thesis for prospective investments; helping identify strong targets in industry niches with a sustainable competitive advantage and opportunities for operational or strategic improvement.
- Built multiple LBO, DCF, and precedent transaction valuation analyses to estimate a valuation range and IRR potential.

MLG Blockchain Consulting, Summer Analyst

Toronto, Canada | May 2018 - Aug. 2018

- Studied digital assets on business model, economics, senior management, technical analysis, and outlook; recommended highest quality digital asset investment opportunities across multiple sectors to angel investors and leading investment firms.
- Helped consulting team in providing consultation services to corporate clients, such as technical consulting, product design, capital raising, and full-suite marketing; firm's service quality improved and new client business requests increased by 4%.
- Collaborated on multiple research reports, client whitepapers, and client presentations; helped firm establish a strong database of internal research reports and client deliverables and presentations were created and delivered 5% more efficiently.
- Created content for "Blockchain Technology Introduction" section of company's blockchain course for new investors; participant satisfaction for aforementioned section increased by 8% and overall enrollment increased by 6% compared to prior sessions.

Alzheimer's Society of Ontario, Summer Analyst

Toronto, Canada | May 2017 - Aug. 2017

- Assisted the Alzheimer's Society of Ontario, Alzheimer's Society of Canada, and Alzheimer's Society of Toronto, which are three separate charities, in merger and restructuring of their individual finance departments into a shared finance department.
- Developed a consolidated manual that combined, examined, and simplified finance and accounting policies and procedures of each charity; operational efficiency for cheque donations increased by 3% and new staff training time was reduced by 15%.
- Aided senior management in analyzing each charity's investment portfolio and developing new target asset allocation goals for investment managers; recommended lowering exposure in 2 sectors by 5% that helped portfolio better meet risk-return goals.
- Helped accountants and controller with accounts receivable, accounts payable, and month-end reconciliation tasks; regular bookkeeping time decreased by 8% and month-end reconciliation was completed 7% faster than prior months.

ADDITIONAL INFORMATION

Extracurricular Activities: Engagement Manager for Ivey FinTech Club's Consulting Program, Member of Ivey Finance Club, VP of Academic Affairs for HBA Section 1, Section 1 Representative at Ivey HBA Student Association, Finance Executive at Students Offering Support (SOS) Laurier, Competitor in the Montreal Exchange Options Simulation, Finalist in the Laurier RBC Trading Competition, Executive at Wilfrid Laurier University Rotaract Club, Member of Laurier Investment and Finance Association, Teaching Assistant at Peel District School Board

Skills: Bloomberg Terminal, Capital IQ, Microsoft Office, Python (beginner), R (beginner)

Certifications: Bloomberg Market Concepts, Bloomberg Analytics Certification, CFA Level 2 Candidate

Interests: Toronto Raptors, fantasy basketball, personal investing, films, international politics, reading, poker, board games