**Jose G. Duran**

515.305.6595 | [joseduran1399.jd@gmail.com](mailto:joseduran1399.jd@gmail.com) | San Francisco, CA

**PROFESSIONAL SUMMARY**

Finance Professional with advanced experience in **financial modeling** and underwriting within the technology industry. Demonstrates proficiency in building complex liquidity analyses, scenario testing models and collaborating with cross-functional teams. Notable achievements include designing portfolio tracking models and facilitating significant debt transactions amounting to over **$250+ million**, supporting efficient portfolio management. Eager to leverage skills in financial analysis to excel as an agile contributor for dynamic and multifaceted strategic projects.

**SKILLS**

Excel Modeling, Financial Planning & Forecasting, GAAP Accounting Principles, Power BI, SQL, Tableau

**PROFESSIONAL EXPERIENCE**

**Silicon Valley Bank,** San Francisco, CA **November 2022 – Present**

*Senior Associate*

* Led strategic finance initiatives for new transactions of exceeding **$50+ million** to drive decision making by building liquidity analysis, **Excel forecasting models**, drafting term sheets to clients, and underwriting the final memo for enterprise software companies that raised Series A through D equity rounds
* Collaborated with **cross-functional** teams to design and implement growth strategies for high-value enterprise software clients, driving **$150+ million** in debt transactions and expanding the debt portfolio by **25%**
* Developed and implemented an **Excel**-based portfolio tracking system, streamlining KPI reporting and enabling accurate valuation analyses, which improved operational efficiency and data-driven decision-making by **200%**
* Trained and supervised 12+ junior associates in financial accounting, underwriting, portfolio management, and due diligence responsibilities, serving as the go-to resource for ad hoc inquiries
* Spearheaded due diligence and investment strategies for 30+ B2B technology clients, presenting detailed business updates and strategic recommendations to **senior leadership** to enable data-driven decision-making

**Bridge Bank,** San Francisco, CA **October 2021 – October 2022**

*Technology Lending Analyst*

* Assisted in developing innovative debt structures such as venture debt loans and recurring revenue LOC, closing over 15+ deals with total loan commitments exceeding **$100+ million**, demonstrating strategic financial planning
* Streamlined a portfolio management process for 20+ companies by optimizing the collection and analysis of monthly reports, aligning company performances with strategic growth plans
* Engaged in due diligence discussions with company executives and investors—covering venture capital, private equity, and strategic investors—to develop capital structure solutions for technology and innovation sectors, honing KPI reporting and financial analysis skills

**Wells Fargo & Company,** Omaha, NE **July 2020 - September 2021**

*Middle Market Banking Analyst*

* Attended a six-month analyst program structured around learning financial modeling, and credit underwriting
* Initiated transactions and managed a portfolio of 10+ companies with revenues from **$5 million** to **$2 billion** from various industries including investor real estate, private equity, telecommunications, and agriculture
* Partnered with relationship teams to structure and propose credit transactions as well as coordinate customer oversight, documentation, and loan closing processes for new and existing customers

**EDUCATION**

**University of Iowa**  **Class of 2020**

BBA, Finance | BBA, Economics

* Achievements: GPA: 3.79/4.00, Financed 100% of tuition with scholarships based on academics and leadership

**INTERESTS**

Baseball (Dodgers), Boxing, Ironman Triathlons, Salsa Dancing, Surfing, Renaissance Art (Studied in Italy)