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William James Beshears

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EDUCATION

The Wharton School, University of Pennsylvania

Philadelphia, PA

Candidate for Bachelor of Science in Economics

Sep 2008 – May 2012

- **Concentrations:** Finance, Legal Studies, Operations and Information Management
- **Overall GPA:** 3.61/4.00 (*Concentration GPA:* 3.77/4.00)
- **Relevant Coursework (*Fall 2011):** Corporate Valuation*, Advanced Corporate Finance, Financial Statement Analysis and Reporting Incentives, International Financial Markets, Financial and Managerial Accounting, Tax and Business Strategy
- **Honors:** Deans List 2010 - 2011, Joseph Wharton Scholar (one of 30 students in graduating class selected for a research honors program culminating in a research thesis), Benjamin Franklin Scholar (scholastic program centered around honors seminars)

Monsignor Kelly Catholic High School

Beaumont, TX

High School Diploma

Jan 2005 – May 2008

- 3.98/4.00 GPA, AP Scholar with Distinction, National Merit Finalist, National Forensics League Degree of Premier Distinction

WORK EXPERIENCE

Lazard Frères & Co. LLC

New York, NY

Summer Analyst, Mergers & Acquisitions

May 2011 - Jul 2011

- Participated in buy- and sell-side transactions in the FIG, industrials, and power space and worked on pitches in the infrastructure, alternative energy, and consumer space; prepared valuation analyses, client presentations, and merger and LBO models
- Selected Project Experience:
 - Buy side advisory for a ~\$3.0b cross-border bid process targeting a portfolio of foreign insurers and asset managers
 - Constructed parts of the pro-forma and accretion/dilution models that were sensitized for different financing mixes and different foreign income repatriation decisions
 - Broke down potential synergies from each target company for pro-forma income projections
 - Buy side advisory for a ~\$1.5b strategic acquisition in the power space
 - Created an IRR analysis sensitized for various multiples and debt loads to gauge the attractiveness of acquisition
 - Calculated the target's beta and WACC at various debt loads for the target's DCF model
 - Strategic acquisition opportunities for a ~\$10b alternative energy company
 - Formed a cash flow credit profile and multiple trading comps analyses focusing on different industry sets
 - Researched and analyzed consolidation and overall market growth in various alternative energy sectors

The Securities Industry and Financial Markets Association (SIFMA)

New York, NY

Asset Management Group & Research Summer Analyst

Jun 2010 - Sep 2010

- Assembled industry research on various securities markets for SIFMA's clients in investment banking and securities trading
- Examined the price behavior of 400 BAB municipals and 2000 comparable corporate bonds during their issuance period
- Produced a database of auction rate municipals and variable rate debt obligations to gauge the sizes of the respective markets

LEADERSHIP EXPERIENCE AND ACTIVITIES

University of Pennsylvania Mock Trial

Philadelphia, PA

Competition Team Captain

Sep 2008 - Present

- Developed a unique finance-based strategy for the defense in a products liability case
- Structured team and competition schedules and led team preparation; arranged tournament logistics, team travel, and lodging

The Pennsylvania Parliamentary Debate Society

Philadelphia, PA

Tournament Equity Director and Novice Mentor

Sep 2008 - Present

- Trained "novice" team members and organized novice debate scrimmages
- Directed "Penn Parli" tournament judging and mediated judging or fairness disputes

The Kappa Alpha Society

Philadelphia, PA

President

May 2008 - Present

- Led the fraternity's recruiting and alumni initiatives and made the fraternity's financial decisions
- Functioned as a liaison between the fraternity, the Inter-Fraternity Council, the university, and the chapter's trustees

SKILLS AND INTERESTS

- **Interests and Activities:** Golf, Kappa Alpha Scotch Club, Formula 1 Racing, SCUBA diver with SSI Master level certification
- **Technical Skills:** Experienced in Excel, PowerPoint, Word, JMP/statistics analysis, CapIQ, FactSet, and Bloomberg
- **Language:** Proficient in Spanish, introductory classroom experience in Mandarin