

Week 3 – Resumes and Networking

## Investment Banking Recruiting

September 20, 2024



# Survey

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# Last Week Quiz

## Week 2 Quiz - Group Choice and Corporate Finance

This is a closed book quiz based on the reading/videos found in the week 2 tab of the content section and from the in-person lecture.

[View page as Instructor](#)

### Time

No Time Limit

### Multiple Attempts

You may take the exam up to 1 time.

This exam will be graded and recorded in the gradebook.

### Open Date

F – Sep 13, 2024

10:45 AM MDT

### Due Date

Su – Sep 15, 2024

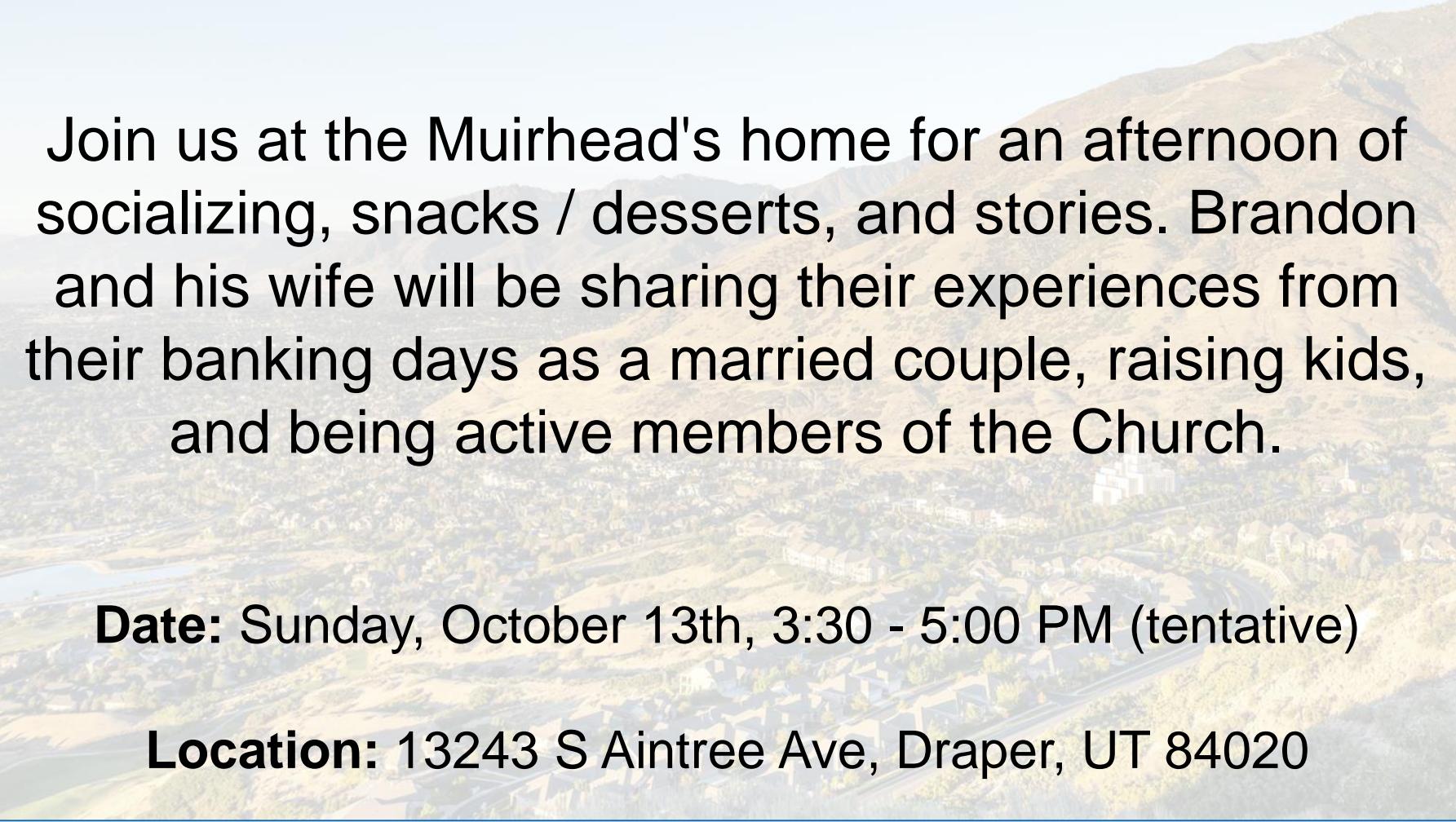
11:59 PM MDT (right before midnight)

Exam Closed

High Score	33 (100%)
Median Score	25 (76%)
Mean Score	24.76 (75%)
Low Score	16 (48%)

## Upcoming event

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Join us at the Muirhead's home for an afternoon of socializing, snacks / desserts, and stories. Brandon and his wife will be sharing their experiences from their banking days as a married couple, raising kids, and being active members of the Church.

**Date:** Sunday, October 13th, 3:30 - 5:00 PM (tentative)

**Location:** 13243 S Aintree Ave, Draper, UT 84020

# Agenda

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**Resumes**

**Networking**



# Why your resume is important

A resume is crucial because it serves as a concise and compelling representation of your qualifications, skills, and experience, making it the first impression that potential employers have of you

- **First Impressions Matter:**

Resumes are often the initial point of contact between you and a potential employer, shaping their perception

- **Efficient Information Showcase:**

Resumes condense your career achievements, skills, and qualifications into a concise format

- **Highlight Relevant Experience:**

Resumes allow you to tailor your qualifications to the specific job, emphasizing the most relevant aspects of your background

- **Demonstrate Professionalism:**

A well-crafted resume demonstrates your attention to detail, organization, and commitment to presenting yourself in a polished and professional manner.

- **Passes Screening Filters:**

Many employers use computer screens to filter resumes. A well-crafted resume increases your chances of passing these initial screens

## RESUME TIPS

### RESUME LANGUAGE SHOULD BE:

- Specific rather than general
- Active rather than passive
- Written to express not impress
- Articulate rather than "flowery"
- Fact-based (quantify and qualify)
- Written for people who scan quickly

### DON'T:

- Use personal pronouns (such as I)
- Abbreviate
- Use a narrative style
- Number or letter categories
- Use slang or colloquialisms
- Include a picture
- Include age or sex
- List references
- Start each line with a date

### TOP 5 RESUME MISTAKES:

1. Spelling and grammar errors
2. Missing email and phone information
3. Using passive language instead of "action" words
4. Not well organized, concise, or easy to skim
5. Not tailored to the position or industry

### DO:

- Be consistent in format and content
- Make it easy to read and follow, balancing white space
- Use consistent spacing, bold, and capitalization for emphasis
- List headings (such as Experience) in order of importance
- Within headings, list information in reverse chronological order (most recent first)
- Avoid information gaps such as a missing summer
- Be sure that your formatting translated properly if converted to a .pdf

### PLAN TO WORK INTERNATIONALLY?

Resume guidelines can vary from country to country.

# Resume template & format

<b>John A. Doe</b> 100 University Ave, Provo, UT 84602 (555) 555-5555 johndoe@marriottschool.bryu.edu	
<b>EDUCATION</b>	
Brigham Young University – Marriott School of Management <i>Bachelor of Science in XXXXXX</i>	Provo, UT Apr 20XX
<ul style="list-style-type: none"><li>▪ GPA 4.00 / 4.00</li><li>▪ ACT 36/36, 99<sup>th</sup> Percentile (if applicable)</li><li>▪ <i>Name of Scholarship</i>, Merit-Based/Academic/Athletic Scholarship</li><li>▪ Membership or leadership positions held in related academic clubs/organizations<ul style="list-style-type: none"><li>— Description of club responsibilities, results, and skills developed (if applicable)</li></ul></li><li>▪ Academic recognitions and awards</li></ul>	
<b>EXPERIENCE</b>	
Company Name <i>Title of Position Held</i>	New York, NY Jun 20XX – Aug 20XX
<ul style="list-style-type: none"><li>▪ Bullet 1 describing experience, results, and skills developed</li><li>▪ Bullet 2</li><li>▪ Bullet 3</li></ul>	
<i>Select Transaction Experience (if applicable)</i>	
<ul style="list-style-type: none"><li>▪ Bullet 1 describing transaction and your role, results, and skills developed</li><li>▪ Bullet 2</li></ul>	
Company Name <i>Title of Position Held</i>	Dallas, TX Jan 20XX – Apr 20XX
<ul style="list-style-type: none"><li>▪ Bullet 1 describing experience, results, and skills developed</li><li>▪ Bullet 2</li><li>▪ Bullet 3</li></ul>	
Company Name <i>Title of Position Held</i>	Salt Lake City, UT Jun 20XX – Aug 20XX
<ul style="list-style-type: none"><li>▪ Bullet 1 describing experience, results, and skills developed</li><li>▪ Bullet 2</li></ul>	
Company Name <i>Title of Position Held</i>	Provo, UT Jan 20XX – Apr 20XX
<ul style="list-style-type: none"><li>▪ Bullet 1 describing experience, results, and skills developed</li><li>▪ Bullet 2</li></ul>	
<b>VOLUNTEER SERVICE</b>	
Company Name <i>Title of Position Held</i>	Provo, UT Aug 20XX – Present
<ul style="list-style-type: none"><li>▪ Bullet 1 describing experience, results, and skills developed</li><li>▪ Bullet 2</li></ul>	
The Church of Jesus Christ of Latter-day Saints <i>Volunteer Representative</i>	Location of Mission Jan 20XX – Jan 20XX
<ul style="list-style-type: none"><li>▪ Bullet 1 describing experience, results, and skills developed</li><li>▪ Bullet 2</li><li>▪ Bullet 3</li></ul>	
<b>SKILLS &amp; INTERESTS</b>	
<ul style="list-style-type: none"><li>▪ Eagle Scout, Boy Scouts of America</li><li>▪ Other personal or unique accomplishments and recognitions</li><li>▪ Interests: XXXXXX</li></ul>	

## General Format

- Use the finance society / IBA template
- Times New Roman 10.5pt font, section headers should be 11pt
- Make the sides spacing (0.6) equal and
- Use square bullets and don't make resume longer than 1 page

## Header

- Name should be 16pt centered
- Use your permanent address & cell phone number
- Create an email specifically for recruiting, DO NOT PUT LINKEDIN

## Education

- Include your major and graduation date, do not list your ACT if under 30
- Do not list your previous college, this is a good place to list your clubs and any case competition placements
- Try everything you can to get your GPA above 3.7

## Experience

- Start with your most current experience first and abbreviate months to 3 letters and states to 2 letters
- Try to keep experience to 3 bullets and 1 line (2 max) for each bullet
- Take up the entire line, avoid whitespace



# What to include and not include

	Do Include	Do Not Include
Education	<ul style="list-style-type: none"><li>▪ Case Competition placements (i.e. finalist, 1<sup>st</sup> place)</li><li>▪ Your major GPA if higher than cumulative (include both)</li><li>▪ All scholarships</li><li>▪ ACT Score if &gt;30</li></ul>	<ul style="list-style-type: none"><li>▪ Clubs if you are not an active participant</li><li>▪ Schools you transferred from</li><li>▪ A minor you do not actually plan on completing</li><li>▪ Relevant Coursework unless you need to fill space and have relevant coursework</li></ul>
Experience	<ul style="list-style-type: none"><li>▪ Transactions you worked on during internships, include vague information if they are unannounced</li><li>▪ Case competitions</li><li>▪ Descriptions of the company you worked at</li><li>▪ Incoming experiences</li><li>▪ Proper tense verbs for internships</li></ul>	<ul style="list-style-type: none"><li>▪ Online certifications</li><li>▪ Lies or obvious exaggerations to things you have done, they will find out</li><li>▪ Anything during your internship you cannot speak well about</li><li>▪ Confidential information</li></ul>
Service	<ul style="list-style-type: none"><li>▪ Service activities you actively participated in, not something you did just once</li></ul>	<ul style="list-style-type: none"><li>▪ The number of baptisms you had on your mission</li><li>▪ Number of hours "you worked" on the mission</li></ul>
Skills / Interests	<ul style="list-style-type: none"><li>▪ Stuff you are interested in, BE SPECIFIC!</li><li>▪ Awards and recognitions</li></ul>	<ul style="list-style-type: none"><li>▪ That you are hardworking and eager to learn</li><li>▪ That you are proficient in Microsoft office</li></ul>

A photograph showing two men in an office setting. One man, wearing glasses and a dark suit, is looking down at a document. Another man's back is visible in the foreground, wearing a light-colored shirt. A white rectangular box with a black border and rounded corners is overlaid on the image, containing the text.

**Proficient in  
Microsoft Word**

# Thomas Foulger

1505 N Canyon Rd, Provo, UT 84604 #134  
(760) 809-2318 | tbfoulger1@gmail.com

## EDUCATION

### Brigham Young University

*Bachelor of Science in Economics, Bachelor of Arts in Spanish Studies, Minor in Business*

Provo, UT  
Apr 2025

- GPA 4.00 / 4.00
- ACT 33 / 36, 98<sup>th</sup> Percentile
- Relevant Coursework: Economics 110, Calculus 112
- BYU, Full Tuition Academic Scholarship, *Economics Department*, Merit-based Scholarship
- Active member of Investment Banking Association, Private Equity and Venture Capital Association

## EXPERIENCE

### California Municipal Finance Authority (*Tax-Exempt Bond Financing and Issuance*)

*Intern*

Carlsbad, CA

May 2022 – Aug 2022

- Performed deal structure research, data organization and analysis, and company compliance
- Worked with company leaders to understand tax-exempt bond deal structures, witnessing the issuance of more than \$700 million of bonds
- *Welfare Tax Exemption Deal Structure*
  - Headed the creation of a detailed research findings document for company partners and attorneys
  - Presented research findings and deal structure potential to company partners
- *Closed Deal Data Compilation and Organization*
  - Developed an interactive map that streamlined the compliance process for more than 500 projects
  - Traveled across California to complete project review and compliance

### Utah Valley Tennis (*Youth Tennis Organization*)

*Head Coach*

Provo, UT

Aug 2022 – Present

- Currently working as Head Coach for a local competitive middle school tennis team
- Organize practice drills, team lineups, and match scheduling for a 22-person team

## LEADERSHIP & SERVICE

### The Church of Jesus Christ of Latter-day Saints

*Volunteer Representative*

Huánuco, Peru / Salt Lake City, UT

Sep 2019 – Sep 2021

- Responsible for the results of groups of 15-30 volunteers
- Provided 75+ trainings covering a variety of topics: leadership, social skills, goal setting, follow-up, teaching

### Humanitarian XP (*International Humanitarian Aid Provider*)

*Volunteer Laborer*

Suva, Fiji

Jun 2018 – June 2018

- Worked with a group of volunteers to build sustainable bathrooms for a rural Fijian village

## AWARDS, SKILLS & INTERESTS

- Spanish, professional working proficiency
- *Eagle Scout*, Boy Scouts of America
- Proficient in Excel, Word, PowerPoint, and Outlook
- Enjoy listening to Latin music, playing tennis, basketball, pickleball, traveling, and skiing
- Traveled to Mexico, Israel, Jordan, Peru, China, Costa Rica, France, Italy, Vietnam, Thailand, and Fiji

# Things you can do to fill out your resume

## Internships

- Find a balance between recruiting prep / maintaining grades / and personal sanity
- LinkedIn and Handshake
- Look at upperclassmen's LinkedIn to see what they did during recruiting
- Utilize your personal network

John A. Doe	
1607 N. Cicero St., Maple Leaf, CT 11144 (555) 555-5555   jdoe@mapleleaf.edu	
Position: Young University - Masters School of Business	
Address of Business or in ADDRESS, Major or PEPPERDINE	
- City: Maple Leaf, CT	
- State: Connecticut, USA	
- Name of Schooling: Mba-honors Academic-Achievement Scholarship	
- Degree: Bachelor of Arts in Business Administration, a number of summers (if applicable)	
- Membership or leadership position held in different academic organizations (Indicate leadership position title)	
- Related Committees (if any) and/or involvements (if any)	
- Related Committees (if any) and/or involvements (if any)	
EXPERIENCE	
Caterer Name: Brief description of firm	
Title of Position Held	
- Duties & responsibilities: What you did, how you did it and what value your actions created	
- Skills used: What skills did you use to complete your tasks and responsibilities	
- Education required: What level of education did you have to have to perform this position	
- Other: (any other information you feel is important)	
- Radio: describing what you did, how you did it and what value your actions created specific to this transaction	
- Television: describing what you did, how you did it and what value your actions created specific to this transaction	
- Magazine: describing what you did, how you did it and what value your actions created specific to this transaction	
- Book: describing what you did, how you did it and what value your actions created specific to this transaction	
- Other: (any other information you feel is important)	
Customer Name: Brief description of firm	
Title of Position Held	
- Duties & responsibilities: What you did, how you did it and what value your actions created	
- Skills used: What skills did you use to complete your tasks and responsibilities	
- Education required: What level of education did you have to have to perform this position	
- Other: (any other information you feel is important)	
Liaison: Name & Title	
Organization Name: Brief description of organization	
Title of Position Held	
- Duties & responsibilities: What you did, how you did it and what value your actions created	
- Skills used: What skills did you use to complete your tasks and responsibilities	
- Education required: What level of education did you have to have to perform this position	
- Other: (any other information you feel is important)	
The Church of Jesus Christ of Latter-day Saints	
Volunteer Agreement	
- Duties & responsibilities: What you did, how you did it and what value your actions created	
- Skills used: What skills did you use to complete your tasks and responsibilities	
- Education required: What level of education did you have to have to perform this position	
- Other: (any other information you feel is important)	

## Case Competitions

- Great experience to talk about during interviews
- Excellent opportunities to get hands on experience that you don't find in many internships



## Volunteer

- Find some type of group to get involved with
- Can also find something to get involved with over a break



# How to write effective bullet points

Writing effective bullets for a resume is crucial as they succinctly communicate your accomplishments, skills, and contributions, making a compelling case for your suitability to potential employers

- Quantify Achievements:** Use specific numbers and metrics to quantify your accomplishments in many bullets
- Action-Oriented Language:** Start each bullet point with a strong action verb that conveys your proactive role in a task or project
- Tailor to the Job:** Customize your resume bullets to align with skills needed in investment banking. For example, modeling or deck building experience is highly relevant as well as any selected transaction experiences
- Concise, Clear, and Fill the Space:** Keep your bullet points concise, focusing on the most critical information. Bullets should extend to the end of the page
- Show Results and Impact:** If possible, describe not only what you did but also the results and impact of your actions. Did your work increase revenue, improve efficiency, or solve a specific problem?

LEADERSHIP								
Accomplished	Achieved	Administered	Analyzed	Assigned	Attained	Chaired	Consolidated	
Contracted	Coordinated	Delegated	Developed	Directed	Earned	Evaluated	Executed	
Handled	Headed	Impacted	Improved	Increased	Led	Mastered	Orchestrated	
Organized	Oversaw	Planned	Predicted	Prioritized	Produced	Proved	Recommended	
Regulated	Reorganized	Reviewed	Scheduled	Spearheaded	Strengthened	Supervised	Surpassed	
COMMUNICATION								
Addressed	Arbitrated	Arranged	Authored	Collaborated	Convinced	Corresponded	Delivered	
Developed	Directed	Documented	Drafted	Edited	Energized	Enlisted	Formulated	
Influenced	Interpreted	Lectured	Liaised	Moderated	Moderated	Negotiated	Persuaded	
Presented	Promoted	Publicized	Reconciled	Recruited	Reported	Rewrote	Spoke	
Suggested	Synthesized	Translated	Verbalized	Wrote				
RESEARCH								
Clarified	Collected	Concluded	Conducted	Constructed	Critiqued	Derived	Determined	
Diagnosed	Discovered	Evaluated	Examined	Extracted	Formed	Identified	Inspected	
Interpreted	Interviewed	Investigated	Modeled	Organized	Resolved	Reviewed	Summarized	
Surveyed	Systematized	Tested						
TECHNICAL								
Assembled	Built	Calculated	Computed	Designed	Devised	Engineered	Fabricated	
Installed	Maintained	Operated	Optimized	Overhauled	Programmed	Remodeled	Repaired	
Solved	Standardized	Streamlined	Upgraded					
TEACHING								
Adapted	Advised	Clarified	Coached	Communicated	Coordinated	Demystified	Developed	
Enabled	Encouraged	Evaluated	Explained	Facilitated	Guided	Informed	Instructed	
Persuaded	Set Goals	Stimulated	Studied	Taught	Trained			

# How to talk about experiences without exaggerating

**Common question: Can I include a deal or a transaction on my resume if I wasn't there for the entire process or wasn't involved in every step?**

Yes...but use  
the following as  
a guide

1. Did I actually have any involvement?
2. Would my supervisor sign off on what I am writing down?
3. Can I speak intelligently about what I am writing down?

## Examples

### Crewe Capital (Middle-Market Investment Bank) *Investment Banking Fall Analyst*

Salt Lake City, UT  
Sep 2023 – Present

- Staffed on live M&A advisory and debt financing deals for companies and financial sponsors across many sectors
- Created confidential information memorandums and other materials for M&A deals ranging in \$5-25M in EBITDA
- Performed comparable company analysis for multiple deals using appropriate EBITDA multiples and other metrics

#### Selected Transaction Experience

#### *Sell-side Advisor to ~\$200M Mechanical Contracting Company*

- Conducted valuation using comparable public companies and precedent transactions to find several multiple ranges
- Created a confidential information memorandum and developed a buyers list which resulted in a signed LOI

### Brigham Capital (\$125k Student-managed public equity fund)

Provo, UT

#### *Senior Analyst – Industrials Group*

Sep 2023 – Present

- Co-led team of 7 individuals in covering the industrials sector; performed due diligence to pitch stocks to committee
- Directed stock pitch for a global nuclear fuel supplier in portfolio to reevaluate investment thesis and stock returns

#### Selected Investment Experience

#### *Alaska Airlines (ALK) – Buy Recommendation*

- Executed analysis on attractive risk/return profile with upside of 90% at \$60/share or downside of 10% at \$30/share

### Cimarron Healthcare Capital (Healthcare Private Equity Firm)

Salt Lake City, UT

#### *Fall Analyst Intern*

Sep 2023 – Dec 2023

- Assisted in end-to-end due diligence for multiple prospective healthcare acquisitions, including market research, modeling and forecasting, and engaging with C-Level management to discuss possible deal structure of acquisition
- Screened 70+ CIMs and teasers from bankers and delivered extensive investment recommendation to firm members

#### Selected Transaction Experience

#### *Purchase of Practice Management Software add-on for Portfolio Company*

- Created customer revenue model to predict churn after initial upsell, and employee retention and attrition heatmap
- Assisted in post-implementation review and investment memo creation for investment committee and executives

### Radien Legacy Partners (Search Fund)

Provo, UT

Jun 2023 – Oct 2023

- Identified industries and created quality acquisition lists of 200 companies on Grata based on the search fund model
- Performed extensive research on B2B SaaS companies, specifically in the LMS industry, and turn in weekly reports

#### Selected Transaction Experience

#### *Brainier Acquisition*

- Drafted CIM and built the equity portion of the LBO model to acquire a SME LMS business valued at 15M-20M
- Answered 50+ investor questions about the company based on market research and historical financial statements

### Clarke Capital Partners (Middle-Market Private Equity Firm)

Draper, UT

May 2023 – Jul 2023

#### *Summer Analyst*

- Created 6 pitch decks; expanded PortCo operations into logistics industry resulting in a 26%-65% ROI for new clients
- Produced 10+ research reports for senior investors analyzing trends, events & earnings within consumer retail markets

#### Select Transaction Experience

#### *Consumer Retail Tuck-in Acquisitions: Acquired Two Companies at 3.5x & 4.9x EBITDA Multiples Respectively*

- Built & incorporated tuck-in LBO models into parent company model to find a 32% IRR for the whole conglomerate
- Forecasted separate FCF based on acquisition synergies and market conditions to find a 31% & 37% IRR respectively

### Portfolio Advisors LLC (\$40.8bn Private Equity, Credit, and Real Estate Fund)

Darien, CT

Jul 2023 - Aug 2023

#### *Summer Analyst*

- Assisted portfolio managers with investment research and analysis while learning about investment and asset management
- Conducted research on asset classes, including private equity, real estate, and private credit to inform investment decisions
- Developed proficiency in financial software applications to support investment analysis and accurate performance tracking

#### *Project Wave - \$200m annual revenue company securing mission-critical insights through data and analytics for government*

- Executed due diligence on a trophy asset in a multi-million GP-led secondary deal by assessing returns and performance
- Engaged in live calls with a CEO to evaluate the company's success and prepared informational materials for the deal team



# Can you use ChatGPT to edit your resume?

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**Yes... but be smart about it**

- Do not ask ChatGPT to make something from scratch
- Write your sentences and use ChatGPT to make it sound more professional or add/subtract words, so it fits in a line



# Common mistakes

Everyone can have a perfect resume no matter the experience that they have – addressing these potential common mistakes will allow your resume to stand out, and not for the wrong reasons

- Margins, .6 on the left and right (historically we have not cared about this as much)
- Date and number formats being inconsistent, i.e. (Feb and February being in the same resume), (mm and M being in the same resume)
- Including “proficient in MS Office, Excel, etc.”
- Hyperlinked LinkedIn or email addresses
- Incorrect bullets (should be square)
- It is The Church of Jesus Christ of Latter-day Saints, (the d in day is lower case)
- Including your high school in the education section
- Name of your resume is incorrect (Last, First)
- Saying that you did financial modelling without being able to back it up
- Not filling out your lines until the end of the line
- Having a very generic or list of generic interests at the end
- Not putting enough importance on the service section
- Inconsistent spacing throughout
- Award names need to be italicized
- Using passive words like “assisted”

# Resume resources



**Ben Brown**

Benjamindbrown2@gmail.com

IBA VP of Recruiting

EVERCORE

**John A. Doe**  
1967 N. Cedar St., Maple Leaf, CT 31344  
(555) 555-5555 | john doe@maristschools.edu

**Experience**  
**Bachelor Young University – Marist School of Business**  
*Bachelor of Science in XXXXXXX Minor in XXXXXX*  
• GPA: 4.00 / 4.00  
• ACT: 36 / 36 (99th Percentile if applicable)  
• Name of Scholarship: Merit-based/Academic / athletic Scholarship  
• Marist School of Business Dean's List (or 95% of students) for a number of semesters (if applicable)  
• Relevant Coursework: (for non-Finance & Accounting majors)  
• Academic recognitions and awards *Academic recognition or award name*

**Experience**  
**Company Name (brief description of firm)**  
*Title of Position Held*  
Jun 20XX - Aug 20XX  
• Bullet 1 describing what you did, how you did it and what value your actions created  
• Bullet 2  
Selected Transaction/Investment Project Experience (if applicable)  
**Transaction/Investment Project**  
• Bullet 1 describing what you did, how you did it and what value your actions created specific to this transaction  
• Bullet 2 describing what you did, how you did it and what value your actions created specific to this transaction  
**Transaction/Investment Project 2**  
• Bullet 1 describing what you did, how you did it and what value your actions created specific to this transaction  
• Bullet 2 describing what you did, how you did it and what value your actions created specific to this transaction

**Company Name (brief description of firm)**  
*Title of Position Held*  
Jan 20XX - Apr 20XX  
• Bullet 1  
• Bullet 2  
**Experience & Service**  
**Organization Name (brief description of organization)**  
*Title of Position Held*  
San Francisco, CA  
Oct 20XX - Dec 20XX  
• Bullet 1 describing what you did, how you did it and what value your actions created  
• Bullet 2  
**The Church of Jesus Christ of Latter-day Saints**  
**Pioneer Representative**  
Aug 20XX - Present  
• Bullet 1 describing what you did, how you did it and what value your actions created  
• Bullet 2 and current work/etc

**Awards, Skills & Extras**  
• Eagle Scout, Boy Scouts of America  
• Relevant publications and skills such as CFA designation, Wall Street Prep or personal investment portfolio  
• # Place, NYX Case Competition, other personal or unique accomplishments and recognitions  
• Interests & specific personal attribute, experience or interest



# Ben's tips & tricks

While it can be daunting preparing your resume for recruiting season, especially if you feel like you are late to the game, there are a few simple things that you can do to make sure your resume is perfect

- Read the resume guide – it will provide you the answers that you are looking for
- Pack your resume as much as you can, the more stuff that you have on there – the less they are going to take a deep look into it. **Within 2-3 months through case competitions, service and internships you can go from a bare resume to one that will stand out in recruiting**
- Always double check (take the time to read bullet points) your resume before you submit it to a resume drop
- Putting an internship that you have coming up can be a way to demonstrate commitment and fill out your resume more
- Utilize more detail, if at all possible, to **fill out the lines until the end of the lines**
- Do not lie in your resume, it will ALWAYS get back to you
- Have a unique passion at the bottom of your resume, you would be amazed at the number of times that has come up in one of my interviews. **This is more important than you think!**
- If you worked on a live deal and it is confidential – keep it that way, you can possibly do ranges of financial numbers, but play it safe, the places interviewing you need to know that you can keep information confidential
- Get help from upperclassman every time that you go and meet with them, if in person print out a copy that they can mark up in 3 mins. **Ask for feedback in coffee chats.**
- IBA Resume Night in October, bring copies of your resume to be marked up

Examples of top resumes from last year

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LAZARD

Morgan Stanley



# Examples of top resumes from last year

## EDUCATION

### **Brigham Young University – Marriott School of Business**

Bachelor of Science in Finance, Latin American Studies Minor

- GPA 4.00 / 4.00
- BYU Finance Society: Active participant within the Investment Banking Association
- John and Amelia Bowers Scholarship: Academic and Merit-based full-tuition scholarship
- National Football Foundation Scholarship: Athletic, Academic, and Merit-based scholarship
- NCAAs & BIG XII Conference Student-Athlete: BYU Football Team - place kicker, punter, and kickoff specialist

## EXPERIENCE

### **Sorenson Capital (Growth Equity Firm with ~\$1.5B AUM)**

Incoming Summer Analyst Intern

Provo, UT  
Apr 2026

Lehi, UT  
May 2024

### **Sound Ventures (Venture Capital Firm with ~\$1B in AUM)**

Analyst Intern

Provo, UT

Jan 2024 – Present

- Currently sourcing, performing due diligence for & preparing pitch deck presentations for potential tech investments

### **Clarke Capital Partners (Middle-Market Private Equity Firm)**

Summer Analyst

Draper, UT

May 2023 – Jul 2023

- Created 6 pitch decks; expanded PortCo operations into logistics industry resulting in a 26%-65% ROI for new clients
- Produced 10+ research reports for senior investors analyzing trends, events & earnings within consumer retail markets

### **Select Transaction Experience**

*Consumer Retail Tuck-in Acquisitions: Acquired Two Companies at 3.5x & 4.9x EBITDA Multiples Respectively*

- Built & incorporated tuck-in LBO models into parent company model to find a 32% IRR for the whole conglomerate
- Forecasted separate FCF based on acquisition synergies and market conditions to find a 31% & 37% IRR respectively

### **Blue Ladder Capital (Growth Equity Firm)**

Investment Intern

Provo, UT

Jan 2023 – Apr 2023

- Sourced vertically integrated B2B software companies to make \$10-50M majority investments or full acquisitions
- Conducted personable & professional weekly calls with CEOs about company structure and their interest in selling
- Performed & reported on in-depth private equity research for 350+ B2B software companies located in the Midwest

### **Brigham Capital (Student-run Long-Short Hedge Fund with ~\$125K in AUM)**

Equity Research Analyst

Provo, UT

Aug 2022 – Dec 2022

- Created & pitched investment theses based on valuation analysis, competitive advantages & industrial market trends

### **Select Investment Experience**

*Short US Xpress Enterprises Inc (NYSE: USX): Small Cap Trucking & Logistics Company, targeted 30% price decrease*

- Recommended a short due to poor capital allocation, increasing costs of production, and unfavorable economic trends
- Company share price decreased 40% during targeted holding period, rose with take-private acquisition announcement

### **Peak Capital Partners (Real Estate Private Equity Firm)**

Analyst Intern

Provo, UT

May 2020 – Jul 2020

- Supported the creation of pro forma financial models analyzing future multi-million-dollar multi-family acquisitions

## LEADERSHIP & SERVICE

### **Conecciones: Y-Serve Program**

Volunteer Tutor

Provo, UT

Sep 2023 – Dec 2023

- Improve the speaking, reading & math abilities of ESL children of Hispanic families through weekly in-home tutoring

### **The Church of Jesus Christ of Latter-day Saints**

Volunteer Service Representative

Córdoba, Argentina & Lansing, Michigan

Sep 2019 – Sep 2021

- Strengthened communities & families by providing service, improving behavioral habits, & teaching English lessons

## AWARDS, SKILLS & INTERESTS

- Languages: Conversationally fluent in Spanish (reading, writing & speaking) after living in Argentina for 14 months
- Eagle Scout, Boy Scouts of America: Led the organization and execution of a 5K race that helped fundraise \$10,000
- Licensed airplane pilot: flew a Piper PA-28-160 Cherokee, Love to travel: hiked with endangered gorillas in Rwanda

## EDUCATION

### **Brigham Young University – Marriott School of Business**

Bachelor of Science in Finance

Provo, UT

Apr 2026

- GPA 4.00/4.00
- Brigham Young Scholarship (Full-Tuition), merit-based
- University Honors Program and Marriott School Dean's List (Winter 2023)
- Member of Finance Society, Investment Banking Association, and Private Equity & Venture Capital Association

## EXPERIENCE

### **EPIC Ventures (\$150mm Early-stage venture capital fund)**

Incoming Analyst Team Lead

Salt Lake City, UT

Jan 2024 – Present

### **EPIC Ventures (\$150mm Early-stage venture capital fund)**

Junior Analyst

Salt Lake City, UT

Sep 2023 – Dec 2023

- Evaluated 200+ deal prospects across 5+ technology sub-verticals identifying the top 10% for management review
- Performed initial outreach, conducted 35+ calls with CEOs to analyze business, participated in early level diligence
- Collected research in the B2B enterprise software industry, including alternative intelligence-based solutions

### **Brigham Capital (\$125k Student-managed public equity fund)**

Senior Analyst – Industrials Group

Provo, UT

Sept 2023 – Present

- Co-led team of 7 individuals in covering the industrials sector; performed due diligence to pitch stocks to committee
- Directed stock pitch for a global nuclear fuel supplier in portfolio to reevaluate investment thesis and stock returns

### **Selected Investment Experience**

*Alaska Airlines (ALK) – Buy Recommendation*

- Executed analysis on attractive risk/return profile with upside of 90% at \$60/share or downside of 10% at \$30/share

### **Evergreen Partners (Golf course focused, private equity startup)**

Summer Intern

Provo, UT

Jul 2023 – Sep 2023

- Sourced and analyzed list of 1000+ golf courses for targeting potential acquisitions for the firm's first investment
- Researched offerings at individual golf clubs for financial analysis, industry trends within golf club management
- Conducted analysis on financial statements for various private golf courses to assist in the due diligence process

### **Cloud (VC-backed: Win-loss consulting/tech startup)**

Consulting Associate (Operations)

Lehi, UT

May 2023 – Sep 2023

- Edited 20+ 30-minute win-loss interviews per week noting key themes for executives at Adobe, Twilio, T-Mobile
- Shadowed consultants conducting interviews and analyzed decision drivers for B2B sales deals in various industries
- Assisted company pilot AI transcription-based service in the editing, revising, and publishing of win-loss interviews

## ACTIVITIES & SERVICE

### **The Church of Jesus Christ of Latter-day Saints**

Full-Time Volunteer Representative

Fort Worth, TX/Piracicaba, Brazil

Dec 2020 – Dec 2022

- Managed 100+ fellow volunteers, led and instructed at regional trainings, organized meetings to review progress
- Worked alongside director of group organization, conducted analysis to access and improve volunteer performance
- Gained personable communication skills and Portuguese fluency; improved relations with the Univ. of North Texas

### **Canyon del Oro Student Government**

Student Body President

Tucson, AZ

Aug 2018 – May 2020

- Elected by 1800+ student body; led group of 30 peers, conducted club meetings, approved financial budgets
- Planned school-wide dances and assemblies, implemented additional events, increased the attendance at events
- Led out community-based service projects throughout 2-year term, including working with the American Red Cross

## AWARDS, SKILLS & INTERESTS

### **The Tampa Bay Buccaneers, Prickly-Pear Cactus Lemonade, and Coldplay**

- Eagle Scout, Boy Scouts of America; made 250+ comfort kits, stored in police cars for children in distress situations
- Portuguese: Fluency in Portuguese from living in Brazil ~1 year (reading, speaking, writing)
- Travel: Avid learner of different cultures and people, have visited 7+ countries (ex: Japan, England, Thailand)
- Piano: Performed in the Arizona Piano Ensemble (2015-2019) and in high school pep rallies for +2 years

# Examples of top resumes from last year

## EDUCATION

### **Brigham Young University – Marriott School of Business**

Bachelor of Science (Pre-business); Bachelor of Arts in Spanish Studies

Provo, UT  
Apr 2026

- GPA 3.97 / 4.00, ACT 32 / 36, 97<sup>th</sup> Percentile
- *BYU Full Tuition Academic Scholarship*
- *Finance Clubs*: Investment Banking Association (*Vice President of Marketing*), BYU Finance Society Member
- Latin America Business Study Abroad: Visited 4 South American countries and learned from 17 global businesses

## EXPERIENCE

### **Radien Legacy Partners (Search Fund)**

Analyst

Provo, UT  
Jun 2023 – Oct 2023

- Identified industries and created quality acquisition lists of 200 companies on Grata based on the search fund model
- Performed extensive research on B2B SaaS companies, specifically in the LMS industry, and turn in weekly reports
- Selected Transaction Experience

### *Brainier Acquisition*

- Drafted CIM and built the equity portion of the LBO model to acquire a SME LMS business valued at 15M-20M
- Answered 50+ investor questions about the company based on market research and historical financial statements

### **Missionary Training Center (The Church of Jesus Christ of Latter-day Saints)**

Spanish Language Teacher

Provo, UT  
Jun 2023 – Oct 2023

- Taught 100+ young adults to read and speak simply and effectively in the Spanish language in a 6-week timeframe
- Directed a classroom setting of 15+ young adults remotely and in-person to ensure learning and progress in Spanish
- Built PowerPoint presentations and lesson plans to visually display information to enhance learning and practice

### **Real Estate Land Development (Residential Real Estate Broker)**

Supervisor and Recruiter

Boise, ID  
Jun 2019 – Aug 2019

- Recruited, supervised, and worked with 20+ employees in 3 large commercial landscape developing projects
- Ensured punctuality, productivity, and quality of work of my team and reported to Residential Real Estate Broker
- Tracked the hours and handled individual payments of each of the part-time employees totaling over \$2000

### **CJ Cleaning Company (Privately Owned Start-up)**

Business Owner

Boise, ID  
May 2018 – Jun 2019

- Started, developed, and maintained a service business pressure washing and sterilizing garbage bins with a partner
- Created a client-base of 20+ return customers and divided equity with a business partner to whom I sold my share
- Knocked 300+ doors as a salesman to expand customer-base. Washed 200+ bins totaling 150+ hours and \$10,000

## LEADERSHIP & SERVICE

### **The Church of Jesus Christ of Latter-day Saints**

Volunteer Representative

Asunción, Paraguay / San Francisco, CA  
Aug 2020 – Aug 2022

- Taught English as a second language for 200+ hours impacting hundreds of Paraguayan and Bay Area Residents
- Planned and carried out 30+ training conferences in Spanish in 8 cities in Paraguay to 150+ volunteers from diverse cultures, backgrounds and languages to teach specific skills, helping to raise specific key indicators and efficiency

### **Humanitarian XP**

Volunteer Project Builder

La Paz, Bolivia  
July 2019

- Mixed concrete, laid bricks, leveled walls, and transferred tools to build an elementary school in La Paz, Bolivia
- Connected with children and adults in the Spanish language while building, cooking, and cleaning with and for them

## AWARDS, SKILLS & INTERESTS

- Spanish: Fluent in writing and speaking Spanish; lived in 5 countries in South America totaling over 20 months
- *Eagle Scout*, Boy Scouts of America; Led a donation drive and raised over 50 full backpacks totaling \$1,000+
- Athlete: Highschool Varsity Basketball Captain - SA State Semifinals participant; State-qualifying high jumper
- 2022 BYU Intramural Men's Ultimate Frisbee Champion and Basketball intramural participant

## EDUCATION

### **Brigham Young University – Marriott School of Business**

Finance

Provo, UT  
Apr 2026

- GPA 4.00 / 4.00
- ACT 35 / 36, 99<sup>th</sup> Percentile
- *BYU Heritage Full Tuition Scholarship*
- *Marriott School of Business Dean's List Fall Semester 2022, Winter Semester 2023, Fall Semester 2023*
- *VP of Projects*, BYU Finance Society Presidency

## EXPERIENCE

### **Battery Ventures (Venture Capital - B2B Software Investing)**

Analyst Sourcing Extern (Remote)

San Francisco, CA  
Sep 2023 – Dec 2023

- Developed investment thesis on enterprise workflow software in several industries, sourced vertical SaaS startups within the space of application layer software, and pitched investment opportunities to Battery senior leadership
- Credited for sourcing 7 startups receiving initial communications and outreach from investment team at Battery
- Led discussions with target company CEOs and founders, built market map of competitive landscape, and drove financial due diligence of key SaaS Metrics both individually and sharing feedback with a cohort of fellow externs

### **Solen Software Group (Private Equity - B2B Software Investing)**

Private Equity Sourcing Intern

Cottonwood Heights, UT  
May 2023 – Jun 2023

- Responsible for the sourcing of several hundred investments in the startup and growth phases within SaaS verticals including but not limited to: professional workflow enhancement, SMB operations management, and ERP solutions
- Participated in daily M&A meetings and collaborations with the fund's CEO, investment team, and interns
- Created multi-part video series to document the process of sourcing investments for training of other interns

### **Dirty Window Washers (Window Cleaning Services)**

Head of Finances

Provo, UT  
Apr 2023 – Jun 2023

- Developed the pay scale, managed all cash flows, and oversaw cost allocation and spending by engineering excel detailing the distribution of company funds within a startup that generated over \$19,000 in revenues in one summer

### **Clearstone Associates (Private Equity - Accounting Firms and Funeral Home Investing)**

Intern

Provo, UT  
Oct 2022 – Feb 2023

- Completed research project regarding the current state of the accounting industry to assist fund manager with decision-making process and eventual execution of buy-side transactions of small privately owned accounting firms

## LEADERSHIP & SERVICE

### **Humanitarian Experience for Youth (Humanitarian Non-Profit)**

Santiago, Dominican Republic

Trip Leader

Jun 2023 – Jul 2023

- Oversaw the manual construction of an elementary school involving over 20 people; tasked with working in collaboration with a local foreman and the translation of all verbal instructions from Spanish to English
- Responsible for the full-time care of the emotional, spiritual, physical, and mental care of 37 teenagers between the ages of 16 and 18 as well as 4 adult volunteers over the course of 5 weeks of humanitarian work and tourism

### **The Church of Jesus Christ of Latter-day Saints**

Volunteer Representative

San Jose, Costa Rica  
Aug 2020 – Aug 2022

- Provided logistical assistance by facilitating housing and travel arrangements of hundreds of peer volunteers
- Served in leadership positions providing trainings in Spanish to hundreds of peers regarding the improvement of the ability to speak Spanish, development of interpersonal communication skills, and teaching of religious doctrines

## AWARDS, SKILLS & INTERESTS

- Spanish: Professional Working Proficiency
- Avid basketball, tennis, and pickleball player, Denver Nuggets superfan, Olympic length triathlon bronze medalist
- World Travel Enthusiast with experiences in Belize, the Dominican Republic, Costa Rica, and Mexico

# LinkedIn: your digital resume

 **Len Markidan**  
Chief Marketing Officer at Podia

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 **Advertising Target**  
Facebook  
Jul 2004 - Present · 18 yrs 2 mos  
Home  

- Recruited as early user for my experience with having an @edu email address.
- Received a "Facebook Beanie" award for performance in 2006 March Madness bracket.
- Consistently retargeted by F500 brands such as Samsung, Proctor & Gamble, and Verizon.

---

 **Prime Member**  
Amazon  
Feb 2008 - Present · 14 yrs 7 mos  
Home  

- Increased order volume by 823% over 7 years
- Researched diverse product catalog, spanning departments from Simplehuman bag liners to cat food.
- Regularly reported on product quality using review portal.

---

 **Uncertified Genius**  
Apple  
Nov 2003 - Present · 18 yrs 10 mos  
Home  

- Led remote tech support for older family members throughout the country.
- Maintained Siri comprehension rate of over 55% for three consecutive years.
- Once put off a software update for over 8 months.

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 **Account Manager**  
Netflix  
Apr 2009 - Present · 13 yrs 5 mos  
Home  

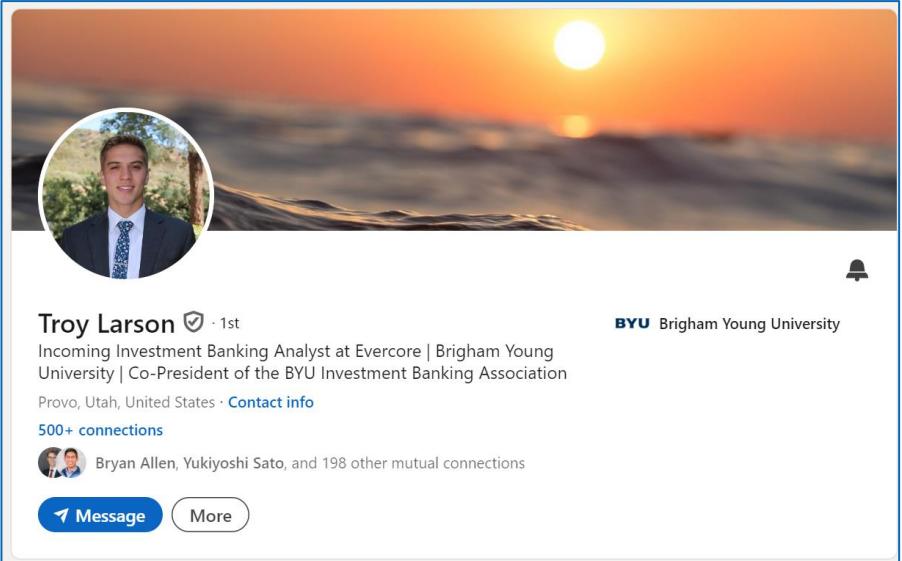
- Responsible for managing (and paying for) account shared by 5 globally distributed family members.
- Exceeded market benchmarks by typing password using Roku remote with 48% accuracy or greater.
- Multi-year recipient of suggestions for movies I've already watched.

---

 **Data Source**  
Google  
Jul 2002 - Present · 20 yrs 2 mos  
Home  

- Responsible for managing submissions of monetizable personal data across a diverse suite of products

# LinkedIn: your digital resume



A LinkedIn profile card for Troy Larson. At the top is a circular profile picture of a young man in a suit. Below it is a large background image of a sunset over water. To the right of the profile picture is a small notification bell icon.

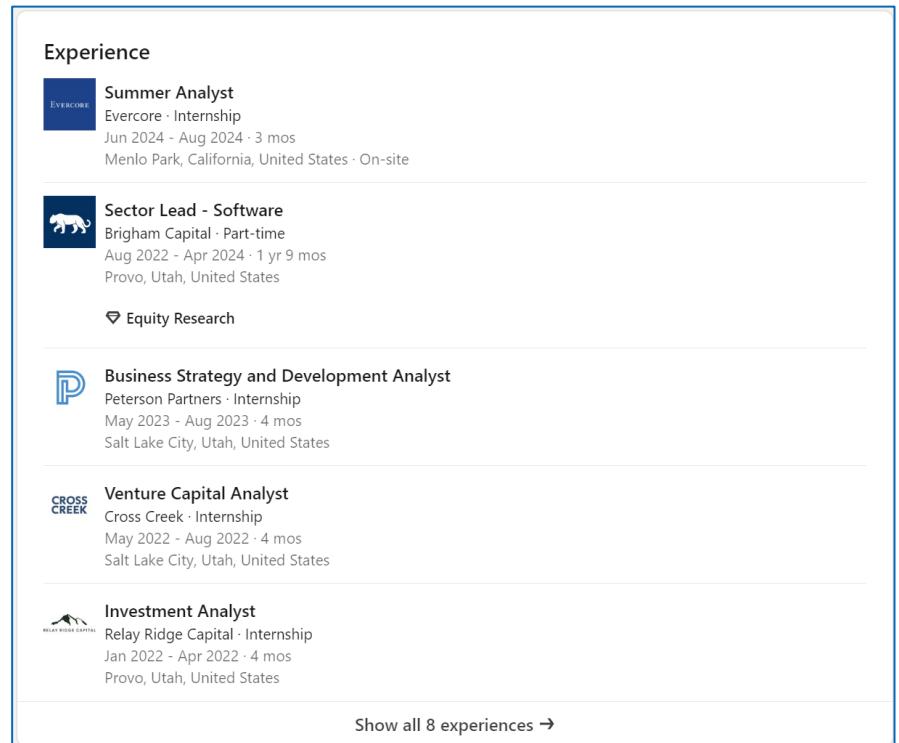
**Troy Larson**  · 1st

Incoming Investment Banking Analyst at Evercore | Brigham Young University | Co-President of the BYU Investment Banking Association  
Provo, Utah, United States · [Contact info](#)

**500+ connections**

 Bryan Allen, Yukiyoshi Sato, and 198 other mutual connections

[Message](#) [More](#)



**Experience**

 **Summer Analyst**  
Evercore · Internship  
Jun 2024 - Aug 2024 · 3 mos  
Menlo Park, California, United States · On-site

 **Sector Lead - Software**  
Brigham Capital · Part-time  
Aug 2022 - Apr 2024 · 1 yr 9 mos  
Provo, Utah, United States

 **Business Strategy and Development Analyst**  
Peterson Partners · Internship  
May 2023 - Aug 2023 · 4 mos  
Salt Lake City, Utah, United States

 **Venture Capital Analyst**  
Cross Creek · Internship  
May 2022 - Aug 2022 · 4 mos  
Salt Lake City, Utah, United States

 **Investment Analyst**  
Relay Ridge Capital · Internship  
Jan 2022 - Apr 2022 · 4 mos  
Provo, Utah, United States

[Show all 8 experiences →](#)



# Workshop

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- Make groups of 3 with people you do not know yet
- Spend 15 minutes reading each group members resume carefully and making edits where you can (Compare to fin society template)
- Please give honest feedback and please do not be embarrassed to share (a resume is not a reflection of you as a person!)

# Thomas Foulger

1505 N Canyon Rd, Provo, UT 84604 #134  
(760) 809-2318 | tbfoulger1@gmail.com

## EDUCATION

### Brigham Young University

*Bachelor of Science in Economics, Bachelor of Arts in Spanish Studies, Minor in Business*

Provo, UT

Apr 2025

- GPA 4.00 / 4.00
- ACT 33 / 36, 98<sup>th</sup> Percentile
- Relevant Coursework: Economics 110, Calculus 112
- BYU, Full Tuition Academic Scholarship, *Economics Department*, Merit-based Scholarship
- Active member of Investment Banking Association, Private Equity and Venture Capital Association

## EXPERIENCE

### California Municipal Finance Authority (*Tax-Exempt Bond Financing and Issuance*)

*Intern*

Carlsbad, CA

May 2022 – Aug 2022

- Performed deal structure research, data organization and analysis, and company compliance
- Worked with company leaders to understand tax-exempt bond deal structures, witnessing the issuance of more than \$700 million of bonds

### *Welfare Tax Exemption Deal Structure*

- Headed the creation of a detailed research findings document for company partners and attorneys
- Presented research findings and deal structure potential to company partners
- Developed an interactive map that streamlined the compliance process for more than 500 projects
- Traveled across California to complete project review and compliance

### Utah Valley Tennis (*Youth Tennis Organization*)

*Head Coach*

Provo, UT

Aug 2022 – Present

- Currently working as Head Coach for a local competitive middle school tennis team
- Organize practice drills, team lineups, and match scheduling for a 22-person team

## LEADERSHIP & SERVICE

### The Church of Jesus Christ of Latter-day Saints

*Volunteer Representative*

Huánuco, Peru / Salt Lake City, UT

Sep 2019 – Sep 2021

- Responsible for the results of groups of 15-30 volunteers
- Provided 75+ trainings covering a variety of topics: leadership, social skills, goal setting, follow-up, teaching

### Humanitarian XP (*International Humanitarian Aid Provider*)

*Volunteer Laborer*

Suva, Fiji

Jun 2018 – June 2018

- Worked with a group of volunteers to build sustainable bathrooms for a rural Fijian village

## AWARDS, SKILLS & INTERESTS

- Spanish, professional working proficiency
- *Eagle Scout*, Boy Scouts of America
- Proficient in Excel, Word, PowerPoint, and Outlook
- Enjoy listening to Latin music, playing tennis, basketball, pickleball, traveling, and skiing
- Traveled to Mexico, Israel, Jordan, Peru, China, Costa Rica, France, Italy, Vietnam, Thailand, and Fiji

# Thomas B. Foulger

6328 Paseo Cerro, Carlsbad, CA 92009  
+1 (760) 809-2318 | [tbfofoulger1@gmail.com](mailto:tbfofoulger1@gmail.com)

## EDUCATION

### Brigham Young University

Bachelor of Science in Economics, Minor in Spanish

Provo, UT  
Apr 2025

- GPA 4.00/4.00, ACT 33/36, 98<sup>th</sup> Percentile
- College of Family, Home and Social Sciences Dean's List (top 5% of students) Fall 2022
- Brigham Young University, 3x Full Academic Scholarship, BYU Economics Department, Merit-based Scholarship
- Active participant in BYU Finance Society, Investment Banking Association, Private Equity & Markets Association
- 1<sup>st</sup> Place 2023 Sorenson Capital Case Competition

## EXPERIENCE

### Rothschild & Co. (Global Investment Banking Firm)

New York, NY

Investment Banking Summer Analyst

Jun 2024 – Aug 2024

- Supported bankers in preparing bake-off materials for a competitive \$5bn+ telecom deal and \$1bn+ healthcare deal
- Created a detailed case study covering industry trends, valuation and a potential acquisition target with rationale

### Silver Fund (BYU's \$3.4mm AUM Long/Short Fund)

Provo, UT

Analyst

Jan 2024 – Apr 2024

- Presented theses, research and recommendations related to public equities to a group of 30+ students and faculty
- Pitched NASDAQ: CHTR, noting depressed multiples, government subsidy availability and Capex deceleration

### Brigham Capital (Long-Short Hedge Fund)

Provo, UT

Consumer Sector Senior Analyst

Jan 2023 – Dec 2023

- Prepared slide decks and investment memos that included key thesis drivers, financial models, and industry trends
- Pitched NYSE: SN, noting R&D spend, overstated ties to China and irrational avoidance of recent public entrants

### Sweetwater Private Equity (Private Market Investment Firm)

Encinitas, CA

Private Equity Summer Analyst

Jul 2023 – Aug 2023

- Prepared investment memos, analyzed deal structures and liquidation preferences and conducted industry research
- Constructed a detailed DCF model for ALGN to gain insights into investor sentiment within the clear aligner space

### Vermilion Rock Advisors (Buy-Side M&A Investment Bank)

St. George, UT

Winter Investment Banking Analyst (Remote)

Jan 2023 – Present

- Conducted detailed financial diligence and sourcing on 200+ SMBs with \$5mm - \$15mm of EBITDA for PE clients
- Screened more than 100 SMBs weekly, extracting pertinent business information for M&A outreach and discussion

### Cedrus Fund (Search Fund)

Boston, MA

Fall Analyst (Remote)

Oct 2022 – Dec 2022

- Identified and researched attractive businesses within the R&D space to develop lists of potential acquisition targets

### California Municipal Finance Authority (Tax-Exempt Bond Financing and Issuance)

Carlsbad, CA

Fall Analyst (Remote)

May 2022 – Aug 2022

- Created detailed research memos and assisted company leaders in successfully issuing \$300mm in municipal bonds

## LEADERSHIP & SERVICE

### BYU Investment Banking Prep Course

Provo, Utah

Co-teacher

Jul 2024 – Present

- Instructing a 3-credit course for 50+ underclassmen, focused on successfully navigating the IB recruiting process

### BYU Investment Banking Association

Provo, Utah

Vice President

Aug 2023 – Apr 2024

- Supported the preparation and placement of 30+ association members into a variety of prominent investment banks

### Family Humanitarian (International Humanitarian Aid Provider)

Senahú, Guatemala

Volunteer Laborer

Dec 2022 – Jan 2023

- Collaborated with local community members to construct water filtering devices, medical clinics, and garden boxes
- Served as a translator for several trip leaders, boosting communication and productivity during the building process

### The Church of Jesus Christ of Latter-day Saints

Huánuco, Peru / Salt Lake City, UT

Volunteer Representative

Sep 2019 – Aug 2021

- Provided 75+ trainings on a variety of topics, including leadership, social skills, goal setting, theology, productivity
- Developed highly advanced Spanish speaking, reading and writing capacities through complete foreign immersion

## AWARDS, SKILLS & INTERESTS

- Spanish, professional working proficiency, seven months of immersed living in remote Peruvian cities and villages
- Eagle Scout, Boy Scouts of America, constructed care packages for more than 200 local individuals lacking housing
- Traveled to 15 countries, including Israel, China, Peru, Jordan, Italy, France, Vietnam, Thailand, Fiji, Switzerland
- Interested in international humanitarian work, tennis (D1 Intramural Champion), Latin music, drone videography

# Workshop

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- Make groups of 3 with people you do not know yet
- Spend 15 minutes reading each group members resume carefully and making edits where you can (Compare to the resumes we handed out)
- Please give honest feedback and please do not be embarrassed to share (a resume is not a reflection of you as a person!)

## 5 min break

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Me taking a break from the internet on my computer to check out the internet on my phone



# Agenda

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**Resumes**

**Networking**



# What is networking?

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# Why is networking necessary?

FINANCE

## There's no shortage of aspiring Goldman bankers as record 236,000 students apply for internships

PUBLISHED TUE, APR 5 2022 8:15 AM EDT | UPDATED TUE, APR 5 2022 10:14 AM EDT

Hugh Son  
@HUGH\_SON

SHARE f X in e

**KEY POINTS**

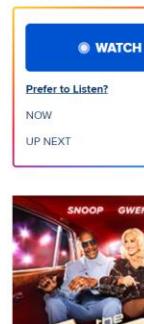
- Goldman said 236,000 people applied for internships globally at the bank, including 79,000 in the Americas, according to data provided to CNBC.
- Instead of dissuading applicants, last year's Wall Street boom — which led to overworked bankers, as well as widespread raises and bigger bonuses — seems to have drawn more interest to the bank.
- The number of college students applying to internships jumped about 16% from 2021, reaching a record level, according to a person with knowledge of Goldman's figures.
- The internship acceptance rate is just 1.5%, according to the person.

● WATCH LIVE

Prefer to Listen?

NOW

UP NEXT



For Goldman Sachs, the global internship program received 236,000 applications for 3,000 places. At JP Morgan, it was 270,855 applications for 4,604 places, of which 54,000 applications went in for the 480 places in the investment bank. Aug 25, 2022



eFinancialCareers

<https://www.efinancialcareers.com/news/2022/08/gr...> :

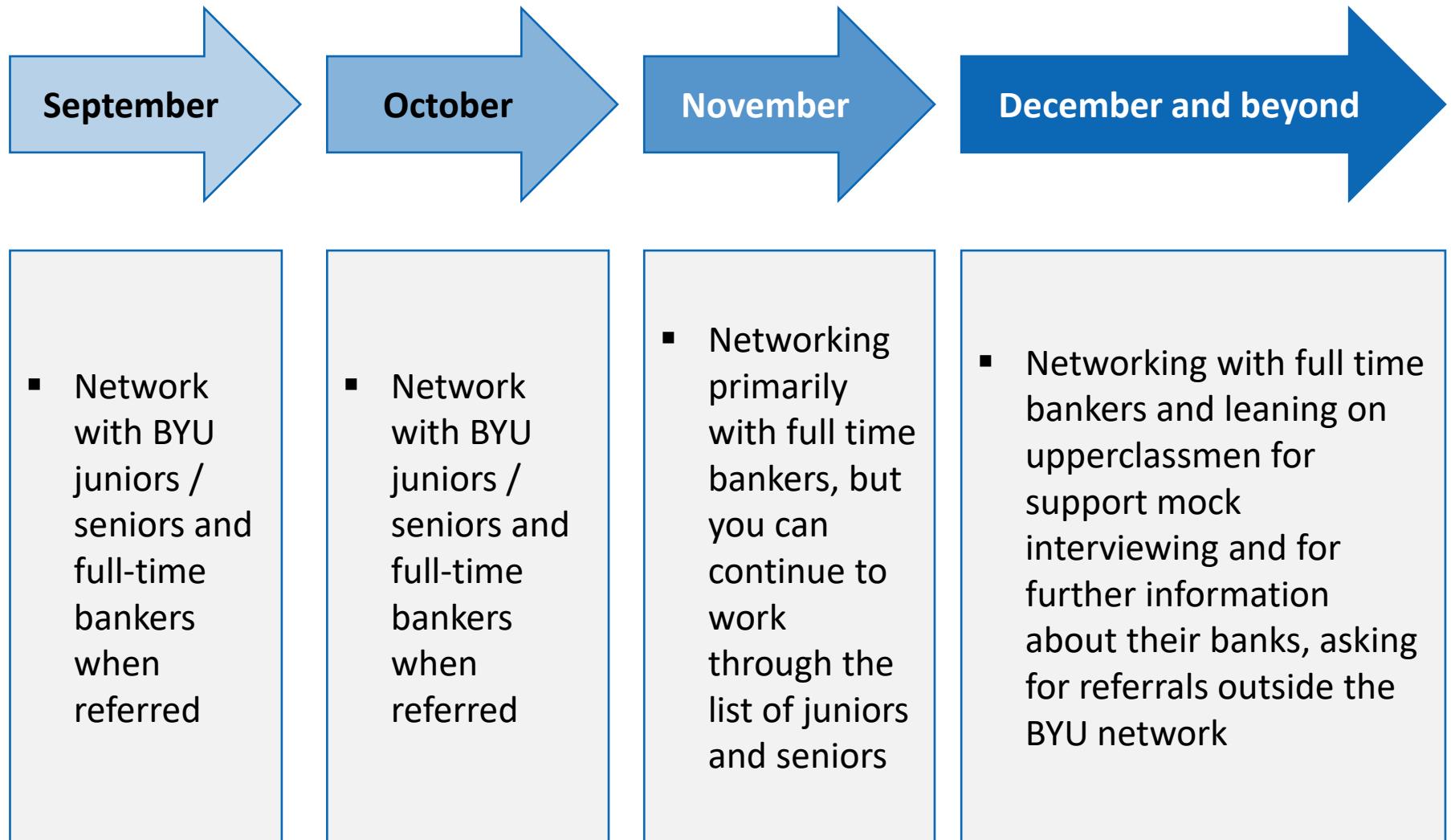
The elite students and no-hoppers of Goldman and JP Morgan

# What is the goal of networking?

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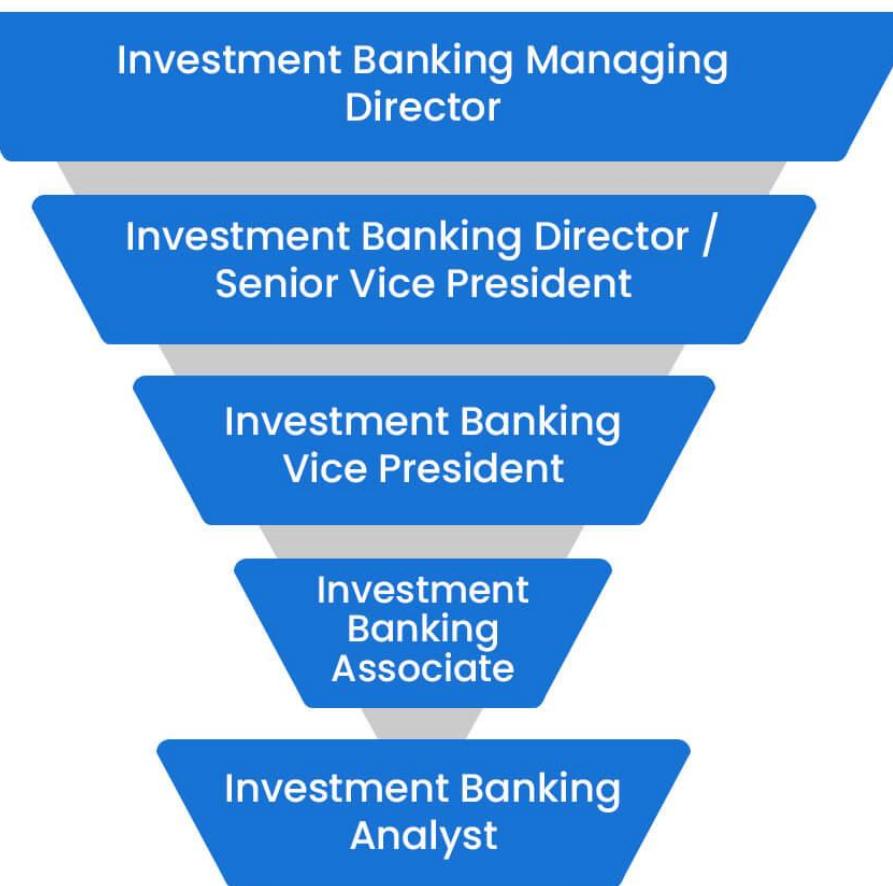
# Networking timeline



# Gaining traction – quality over quantity

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## Investment Banking Career Hierarchy



# BYU placement list

## BYU Investment Banking Association Placement 2024-25

Seniors (**Full-Time Offer Pending**)					Juniors (Internship Offer)				
Name	Email	Company	Location	Group	Name	Email	Company	Location	Group
Adam Lundgreen	adamlun3@byu.edu	Goldman Sachs	San Francisco	TMT	Abe Farighali	abefarighali@gmail.com	Barclays	New York	Generalist
Brandon Ferrero	brandosferrero@gmail.com	Ares	Los Angeles	Flagship Buyout Fund (PE)	Aki Yilmuala	yilmuala@byu.edu	Piper Sandler	Minneapolis	N/A
Bryan Allen	bryan.s.allen8@gmail.com	Rothschild & Co	New York	Generalist	Andrew Ziegenhorn	andrew.ziegenhorn@gmail.com	Goldman Sachs	Houston	Natural Resources
Bryan Crawley	bryan.crawley0@gmail.com	UBS	San Francisco	Technology	Ashton Budge	ashtonb6@byu.edu	Morgan Stanley	Menlo Park	Technology
Chance Power	chancegarrypower@gmail.com	Intrepid	Los Angeles	N/A	Bekim Gjolgu	bjg2001@byu.edu	Jefferies	Dallas	PCA
Chandler Sosa	20chandler12@gmail.com	Deutsche Bank	San Francisco	Technology	Ben Brown	benjamindbrown2@gmail.com	Evercore	New York	PCA
Chris Finch	cjfinch00@gmail.com	Wells Fargo	New York City	M&A	Benjamin Garrett	bgarr@byu.edu	Piper Sandler	Charlotte	N/A
Christian Larimer	christian.j.larimer@gmail.com	Ares	Los Angeles	Direct Lending	Brigham Bent	brigbent@byu.edu	Jefferies	Houston	Energy
Cole Grizzell	cg546@byu.edu	Jefferies	Houston	Energy	Bryon Reese	bryon@byu.edu	Evercore	Menlo Park	Technology
Ellie Snow	snow.ellie@gmail.com	Bank of America	Palo Alto	Technology	Carson Danner	carsondanner@gmail.com	Jefferies	Richmond	Industrials
Ethan Ellsworth	ellsworth.ethan1@gmail.com	Catalyst	San Francisco	N/A	Cannon Bunkall	cannonb5@byu.edu	Barclays	San Francisco	Technology
Jacob Olson	jakeolson7@gmail.com	Piper Sandler	Minneapolis	N/A	Clayton Guo	guoclayton@gmail.com	Rothschild	New York	Generalist
James Graf	jagraf@gmail.com	Guggenheim	Atlanta	N/A	Chris Barney	chris.barney2@gmail.com	Santander	New York	Generalist
Kyle Marsh	kylemarsh28@gmail.com	Rothschild & Co	New York	Generalist	Christian Van Cott	vancott.christian@gmail.com	Goldman Sachs	San Francisco	Healthcare
Myle Larsen	myle.larsen@gmail.com	UBS	New York	M&A	Christopher Horstmann	christopherhorstmann001@gmail.com	Jefferies	San Francisco	Technology
Olivia Hopkin	omhopkin@gmail.com	Gauge Capital	Dallas	Private Equity	Dalton Hawkins	dalton.hawk3@gmail.com	Barclays	New York	Generalist
Rebecca Goodson	beckalgoodson@gmail.com	Goldman Sachs	New York	Cross Markets Group	Elizabeth Hall	elizabethdelahall2@gmail.com	Lazard	New York	Capital Markets Advisory
Robby Gordon	rgordon567@gmail.com	William Blair	New York	PCA	Eric Strobel	eric.strobel@gmail.com	Morgan Stanley	San Francisco	Healthcare
Sam Sloan	samsloan2001@gmail.com	Catalyst	San Francisco	N/A	Ethan Brady	efoxbrady@gmail.com	Goldman Sachs	New York	Cross Markets Group
Scott Wallin	scottwallin2001@gmail.com	Citi	San Francisco	Technology	Grant Keller	grantjke@gmail.com	Houlihan Lokey	Los Angeles	Business Services
Thomas Foulger	tbfoulger1@gmail.com	Rothschild & Co	New York	Generalist	James Giles	jameslarygiles@gmail.com	Citi	San Francisco	Technology
Thomas Kenny	thomaskenny0522@gmail.com	Houlihan Lokey	Los Angeles	Business Services	Jordan Kemp	jordankemp@gmail.com	Rothschild	New York	Generalist
Troy Larson	larson.troy.s@gmail.com	Evercore	Menlo Park	Technology	Matt Barney	matthew.d.barney@gmail.com	Piper Sandler	Minneapolis	N/A
Will Pickard	pickard.will2000@gmail.com	Piper Sandler	Charlotte	Healthcare Services	Matthew Burns	mburns10@byu.edu	Ares	New York	Direct Lending
Christian Tall	thechristiantall@gmail.com	JP Morgan	San Francisco	Technology	Matthias Dunn	matthiasdunn@gmail.com	Morgan Stanley	Menlo Park	Technology
Sophomores (Internship Offer)					McClain Easton	mceastonbyu@gmail.com	Lazard	New York	Generalist
Name	Email	Company	Location	Group	Mitchell Otis	mitchellotis4200@gmail.com	Ares	Los Angeles	Direct Lending
Joseleen Niebbia	josieniebbia@gmail.com	MTS Partners	New York	Healthcare	Nephi Okonah	okonah43@byu.edu	JP Morgan	New York	N/A
					Nick Powell	npowell13@byu.edu	Jefferies	Dallas	PCA
					Riggs Jeslard	riggsjeslard@gmail.com	Houlihan Lokey	Dallas	Special Situations Advisory
					Seth Gould	sethgould@gmail.com	Brown Gibbons Lang	Chicago	Generalist
					Stephen Blackham	stephendblackham@gmail.com	Lazard	San Francisco	Technology
					Will Yeomans	wyeomans33@gmail.com	Wells Fargo	San Francisco	Technology
					Kendall Castellaw	kendall.castellaw@gmail.com	Vista Equity Partners	Chicago	Private Equity



# Utilizing the networking tracker

A	B	C	D	E	F	G	H	I	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL
Junior Networking Tracker												Today's Date: 5/19/2024																							
3	Last Name	First Name	Contacted	School	Company	Industry	Position	Last Contacted	Months since last contacted	Notes	Connection																								
4	Fisher	Graham	Yes	Appalachian State	Homefield / BoFA	CRE	Senior Associate	5/20/2023	19.98		Works for dad																								
5	Simone	Brian	Yes	Providence	Jefferies REGAL NY	IB	Analyst	5/25/2023	19.91		Friends with Colin Reilly																								
6	Gallert	Jonah	Yes	Michigan	Jefferies LevFin	IB	Analyst	5/25/2023	19.91		LinkedIn																								
7	Magnes	Christian	Yes	BYU	Rothschild	IB	Associate	5/25/2023	19.91		Rothschild alum																								
8	Cropper	Colin	Yes	BYU	Rothschild	IB	MD	5/25/2023	19.91		referred to him by Chris Magnes																								
9	Hedger	Chris	Yes	UNC	BoFA	IB	Retired	5/25/2023	19.91		Graham Fisher																								
10	Ellert	Christopher	Yes	Miami	Jefferies FIG	IB	Analyst	5/25/2023	19.91		Cold outreach																								
11	Hattersley	Connor	Yes	Villanova	Jefferies Financial Group	IB	Associate	5/25/2023	19.91		Friends with Colin Reilly																								
12	Faren	Summer	Yes	UCLA	Jefferies Consumer	IB	2nd year Analyst	5/29/2023	19.68		friends with Brian Simone																								
13	Lima	Vincent	Yes		Jefferies LevFin	IB	Associate	5/30/2023	19.61		Colin																								
14	Ng	Henry	Yes	Boston College	Rothschild	IB	Analyst	5/30/2023	19.61		From Chris Magnes																								
15	Hegman	Davis	Yes	Miami	Jefferies TMT	IB	Analyst	5/2/2023	19.55		From Christopher Ellert																								
16	Alexander	Jack	Yes	BYU	Credit Suisse	IB	Analyst	5/2/2023	19.55		Cold outreach																								
17	Angelos	Nick	Yes	BYU	BoFA PEGAL	IB	Analyst	5/2/2023	19.55		Cold outreach																								
18	Bioje	Ian	Yes	Emory NYU MBA	Rothschild	IB	Associate	5/23/2023	19.52		From Chris Magnes																								
19	Varvel	Jack	Yes	BYU	Credit Suisse	IB	Analyst	5/7/2023	19.38		cold email																								
20	Bolter	Gabriel	Yes	SDSU	Jefferies SF	IB	VP	5/8/2023	19.35		cold email																								
21	Li	Kevin	Yes	University of Chicago	Rothschild	IB	Analyst	5/8/2023	19.35		From Chris Magnes																								
22	Liu	Rachel	Yes	Cornell	Jefferies SF	IB	Analyst	5/8/2023	19.35		cold email																								
23	Gale	Carson	Yes	BYU	Jefferies SF	IB	Associate	5/8/2023	19.35		cold email																								
24	Blauer	Jay	Yes	BYU	Wells Fargo	IB	MD	5/9/2023	19.32		came to campus																								
25	Kling	Creighton	Yes	Notre Dame	Deutsche Bank	IB	Associate	5/9/2023	19.32		he did an info session																								
26	Huber	Jack	Yes	Vanderbilt	Deutsche Bank	IB	Analyst	5/9/2023	19.09		he did an info session																								
27	Soper	Taylor	Yes	BYU	Deutsche Bank	IB	Analyst	5/6/2023	19.09		he did an info session																								
28	Zieliske	Erik	Yes	Wisconsin	Bank of America	IB	Analyst	5/7/2023	19.06		Cold outreach																								
29	Moessing	Adam	Yes	BYU	Citi SF	IB	Analyst	5/7/2023	19.06		Referred by Josh Pincock																								
30	Lowe	Darren	Yes	BYU	Citi SF	IB	Analyst	5/7/2023	19.06		Cold outreach																								
31	Gevshenian	Richard	Yes	USC	Jefferies SF	IB	Analyst	5/7/2023	19.06		Referred by Gabriel Bork																								
32	Redkar	Sonia	Yes	Texas	Jefferies	IB	Analyst	5/20/2023	18.96		Referred by Mariseth																								
33	Nelson	Mike	Yes	BYU	William Blair	IB	MD	5/22/2023	18.95		Cold email																								
34	Peterson	Scott	Yes	BYU	Credit Suisse	IB	Analyst	5/24/2023	18.83		Cold email																								
35	Hodge	Ian	Yes	BYU	Wells Fargo	IB	Analyst	5/24/2023	18.83		Info session on campus																								
36	Lui	Rachel	Yes	Cornell	Jefferies SF	IB	Analyst	5/24/2023	18.83		Referred by a VP																								
37	Fu	Mengmeng	Yes	BYU	Citi SF	IB	Analyst	5/30/2023	18.69		Cold outreach																								

< >
Full Time Bankers
Upperclassmen
Outside of Banking
Info Sessions
+
: |
◀ ▶
◀ ▶



# Networking resources

Shared with me > Resources - Investment... > Networking ▾ ⚙

Type ▾ People ▾ Modified ▾

Folders

IB Prep Class 2023 - ... : Networking Template :

Files

2023 Placement : 2024 Placement List : 2025 Placement List :

# Informational interview set-up

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Hi (Insert Name),

I hope this email finds you well! My name is (Name) and I am a sophomore here at BYU studying (Major). I'm planning on recruiting for investment banking Summer Analyst roles in the upcoming cycle; I saw you placed/interned/worked at (Bank Name) and I'd love to learn more about your experience with recruiting and (Bank Name). Could we find a time to meet up and chat?

I have the following availability:

Monday (List Times in Corresponding Time Zone)

Tuesday (List Times in Corresponding Time Zone)

etc.

Let me know if any of these times work for you, if not I'd love to rearrange my schedule and find something that is more convenient for you. I'm happy to meet you anywhere on campus, or if it's best for you a call is fine as well.

I'll attach my resume below for your reference. (PDF)

Looking forward to hearing from you. Thanks in advance for your time!

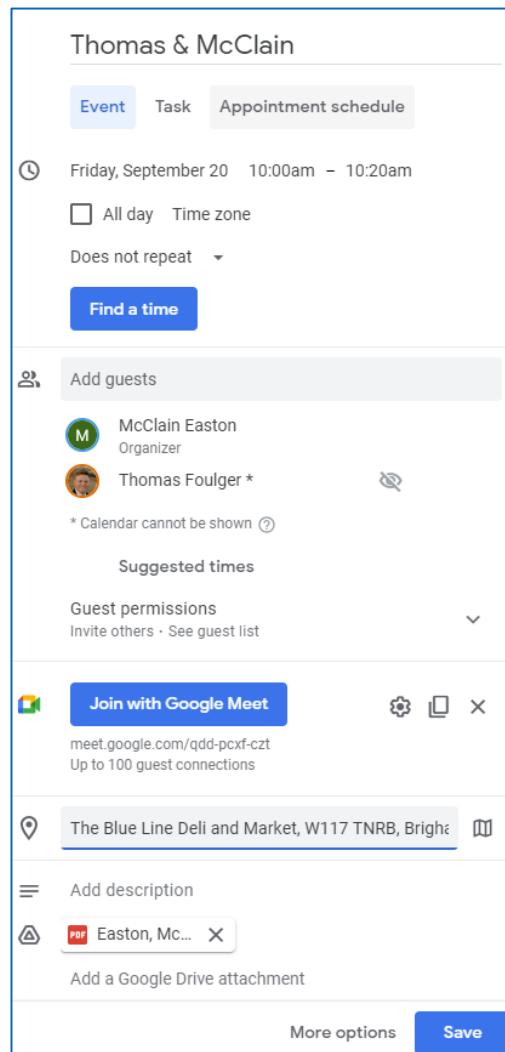
Best,

(Name)

# Informational interview set-up

## Some simple reminders

- Send promptly after they respond
- Confirm meeting on the day of with quick email
- Attach resume
- Be careful with your time zones
- Include location in the invite



# Coffee chat best practices

“Coffee Chats” are the lifeblood of networking in the world of finance – often done virtually they are a chance to introduce yourself, ask questions about the other individual’s career & firm, and offer your unique skillset

Do's	Don'ts
<ul style="list-style-type: none"><li>▪ Begin with some small talk and offer to share your story</li><li>▪ Come prepared with a list of questions</li><li>▪ If in person, ask the other individual if they are ok with you taking notes</li><li>▪ Research the firm and background of the individual with whom you are speaking beforehand</li><li>▪ Express interest in being further considered as a candidate at the bank of the professional</li><li>▪ Offer to be helpful in any way possible and ask for referrals to other individuals at the bank</li></ul>	<ul style="list-style-type: none"><li>▪ Spend too much time conversing about casual topics to begin the call – these are busy professionals</li><li>▪ Ask about compensation, work-life balance, office politics, etc.</li><li>▪ Use words such as “cool”, “bro”, “dude,” etc.</li><li>▪ Interrupt</li><li>▪ Take the call in a busy place – demonstrate respect by taking the call where you won’t be interrupted</li><li>▪ Demean the professional’s bank in any way</li><li>▪ Take longer than 20 minutes unless the professional asks to continue talking</li></ul>

# Do Your Homework!

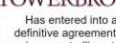
Conversations with professionals **SHOULD NOT** be the first time you have heard anything about a bank – you should have rough idea of the deals they have worked on and be familiar with information available online

M&A

## Raymond James Is Buying Consumer-Focused Investment Bank Financo

By Luisa Beltran

Dec 17, 2020, 2:53 pm EST

September 2024  Has acquired <b>BEAUTYNOWA</b>	September 2024  Has received a majority investment from <b>Freeman Spogli</b>	September 2024  Has acquired <b>Thomas Cook</b> Financial Advisor	August 2024  A portfolio company of <b>Bridgepoint</b> Has been acquired by 
July 2024  A portfolio company of <b>PRELUDER GROWTH PARTNERS</b> Has received a strategic growth investment from <b>TSG CONSUMER</b>	July 2024  Has acquired <b>WINKY LUX</b>	July 2024  Has entered into a definitive agreement to acquire a controlling stake in  A portfolio company of <b>INVISION NORD</b>	July 2024  A portfolio company of  Has acquired <b>Lintbells YUMOVE</b>

### Consumer & Retail Sector Expertise

- Apparel, Footwear & Accessories
- Automotive Aftermarket
- Beauty & HPC
- Consumer Services
- Consumer Technology
- DIY, Lawn & Garden
- E-Commerce Marketplace
- Food & Beverage
- Home Furnishings
- Juvenile Products
- Pet Products & Services
- Powersports & Recreational Products
- Restaurants
- Retail & Franchises
- Travel & Leisure
- VMS

February 2024  A portfolio company of  Has been acquired by 	January 2024  Premier Kings 160 unit Burger King franchise Has been acquired by <b>Multiple Buyers</b>	December 2023  Has been acquired by  Related company of 	December 2023  A portfolio company of  Has received a majority investment from 
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## Formulating opinions

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## Universal questions

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In every informational interview you have, whether you are asked the following the individual with whom you spoke should leave knowing your personal answer to the following array of questions

**“Tell me about yourself.”**

**“Why investment banking?”**

**“Why do you want to work at (bank)?”**

# Coffee chat outline

The structure in which you conduct an informational interview will demonstrate to the banker your professionalism and situational awareness – be aware of their time and guide the conversation

First  
5  
min

## Introductions:

- **Offer to share your background** – this will be the most important part of the call as you leave a first impression on the individual with whom you are conversing.
- Your story should be between 60 and 90 seconds and share a concise picture of who you are and why you reached out.
- Allow him/her to share his/her background in return.

Middle  
10-15  
min

## Q&A:

- Most of the conversation will be time for you to ask questions about the career of professional you are speaking with and the firm by which they are currently employed.
- **You must lead this portion of the conversation unless the professional indicates otherwise.**

Last  
2  
min

## Conversation Wrap-Up:

- In conclusion, thank the professional for their time on behalf of yourself as well as your peers at BYU
- **It is important to leave a lasting impression of gratitude and professionalism from the BYU IB pipeline**
- If the call went well, ask to be put in contact with other professionals at the firm.

# Tell me about yourself

A strong response to this question will be critical both in networking calls as well as interviews during the recruiting cycle – your story will allow professionals to form an impression of who you are as a candidate

## The Beginning

- Briefly introduce your background, including your hometown and educational path, linking your studies to finance if possible. Depending on who you are speaking with, the opportunity to converse may arise at this portion of your story if the professional shares an attribute with you. **Be comfortable adapting this part of your story when needed.**

## Spark

- This portion of how your story should highlight a specific event that you can describe as the time you became interested in finance – this could be trading stocks, an economics class in high school, starting your own business; **it doesn't matter what your spark was as long as you can sell it as a compelling reason to be working in the industry.**

## Growing Interest

- This portion of the story will consist ~50% of what you share – here is your opportunity to **flex your internship and relevant experience** that has helped prepare you as a competitive candidate. You don't need experiences at KKR or Goldman to sell yourself as a candidate, just be able to highlight the relevant skills you have gained along the way.

## The Future

- Wrap it all up by sharing **why the group of the professional with whom you are speaking fits your long-term plans perfectly** – conclude by making it clear that you would love the opportunity to learn more/be a part of the group under consideration.

# Coffee chat example questions

Asking questions that demonstrate preparedness, and professionalism will convey to the professional with whom you are speaking the quality of your candidacy and their willingness to refer you to their co-workers

Firm Culture
<ul style="list-style-type: none"><li>▪ What do you feel differentiates the culture at (bank)?</li><li>▪ What do you enjoy most about working on the _____ team at (bank)?</li><li>▪ In what ways does (bank) hope for Analysts to contribute to the culture?</li></ul>

Career Advice
<ul style="list-style-type: none"><li>▪ What steps did you take in college to ensure a successful career in investment banking?</li><li>▪ What are the most important career skills you have developed working at (bank)?</li></ul>

Experience
<ul style="list-style-type: none"><li>▪ What is unique to the analyst experience at (bank)?</li><li>▪ In what ways would the analyst program at (bank) help me develop the most?</li><li>▪ I saw your group recently advised on (deal) – what role did you play in (deal)?</li></ul>

Recruiting Information
<ul style="list-style-type: none"><li>▪ When do applications open for the Summer Analyst 2026 program?</li><li>▪ What can I do right now to help differentiate myself as a candidate at (bank)?</li><li>▪ What qualities does (bank) notice first when looking at incoming resumes?</li></ul>

# Informational Interviews Delicate Situations

From time-to-time delicate situations may arise in coffee chats – your ability to successfully navigate and even captivate upon these opportunities has the potential to further accelerate your quality of candidacy

If you got an offer from (bank) today, would you take it?



## Good Example:

"It's hard for me to say without an offer on the table, but I am very interested in [XYZ aspect of the program or bank], which aligns perfectly with what I'm looking for in an analyst program."

## Bad Example:

"Absolutely. (Bank) is my number 1 choice and I'd drop everything to work there." (Bad answer if this is simply flattery)

How are you thinking about opportunities across the street? Where does (bank) fall on your priority list?



## Good Example:

"As a student at a non-target school, I think I'd be careful to commit to anything before I have an offer in hand. Right now, more than anything I'm hoping to get a seat at the table to work in the industry. With that said, I've loved [XYZ aspect of the program or bank], – and getting this far in the interview process has helped me to find even greater reason to be excited about this opportunity. (Bank) is among my top priorities, and I'm really looking forward to seeing how this opportunity progresses."



## Bad Example:

"(Bank) is my number 1 choice and I'd drop everything to work there." (Bad answer if this is simply flattery)

# Asking for Referrals



**McClain Easton** <mceastonbyu@gmail.com>  
to Kristen ▾

Tue, Feb 6, 4:00 PM

Hey Kristen,

Thanks again for your time today, I really appreciate it! Looking forward to staying in touch. I'd also love to keep getting to know any of the BYU alums at Rothschild and get some insights on how to best prepare, is there anybody else you might **recommend** reaching out to? If not, no worries at all!

Again, thankyou for your time!

Best,

McClain



**McClain Easton** <mceastonbyu@gmail.com>  
to Jonas ▾

Wed, Feb 7, 7:19 PM

Hi Jonas,

Hope you've been having a good week so far! I really enjoyed our conversation last week, and would love to gather some more insights on the Summer Analyst program, so I wanted to see if you would be willing to **recommend** me to other analysts within your group? No worries if not! More than anything, just trying to be proactive about the process, so if you'd have any other input or insights at this point in the process they would be much appreciated.

Thanks so much for your support!

Best,

McClain

# Example

## Starting the call

**Student:** Thanks for taking the time to meet with me. I know you have a very busy schedule, so I really appreciate you being willing to sit down and share your experience. I've been reading about (XYZ event/story/unique aspect about the bank you learned) about the (XYZ bank) and heard great things / really enjoyed the info session last week, so I've been really looking forward to hearing about the firm firsthand.

**Full-time:** Of course, no worries at all.

**Student:** If it's alright with you, I can start by introducing myself and how I became interested in banking. After that, I'd love to hear about your background, and then I have a few questions about your career and the firm.

**Full-time:** Sounds great.

**Student:** [Tell a 1-1.5-minute story.]

## Ending the call and setting up future referrals

**Student:** Well John, this has been really helpful, and I thank you again for taking time out of your busy schedule. I could go on for a while with questions, but I don't want to take up any more of your time. I'm really looking forward to when this process opens up in the next couple of months, and I'll be sure to update you on my recruiting progress.

**Full-time:** That would be great. Wishing you the best in the process.

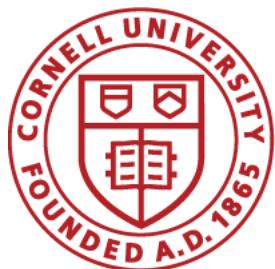
**Student:** Thanks! I'll follow up with an email after this call and if anyone at the firm comes to mind who you think would be helpful for me to talk to, I'd love to connect and learn more about the firm.

**Full-time:** Of course, let me see who I can think of and get back to you on that.

**Student:** Great, thank you! Like I said, thanks again for your time, and I look forward to connecting again soon. Bye.

# Networking outside the BYU network: tough but possible

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**Yale**

**Duke**  
UNIVERSITY



**IBR**

# Informational interviews – key reminders

From time-to-time delicate situations may arise in coffee chats – your ability to successfully navigate and even captivate upon these opportunities has the potential to further accelerate your quality of candidacy



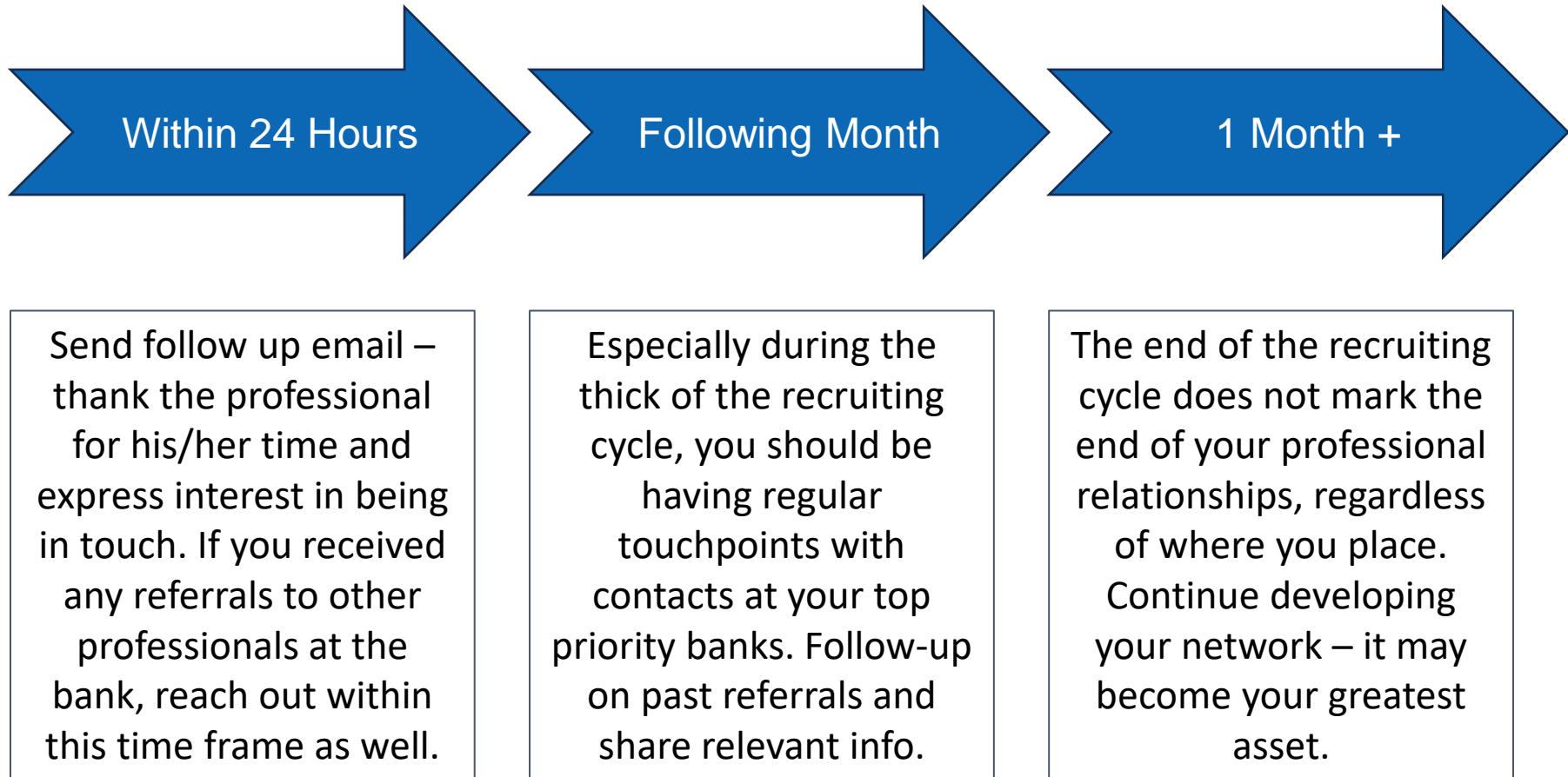
Don't back yourself into any corners. Remember, **BYU candidates are expected to stick to their word** – if you say something the school's legacy depends on you holding to your promise.

The professional you are speaking with has pride in their bank. Most of them probably think it is the best group on wall street. Remember that as you are speaking with them, and **don't come across as greater than when speaking to smaller banks**.

When in doubt, maintain a professional demeanor. **Upholding BYU's longstanding reputation of producing mature candidates depends on your continual professional behavior.**

# Informational interviews – post conversation best practices

Following your conversation with professionals, all is not yet complete and there remains important work to be done to ensure a lasting impression and further progression of your candidacy with the bank



# Networking workshop

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- Form another group with 3 new people – try to find people that have interest in similar banks (NY vs SF, TMT vs Generalist, etc.)
- Spend a few minutes brainstorming questions that you could use with professionals during future coffee chats
- If you have any questions about what is appropriate, please ask us!

# Networking

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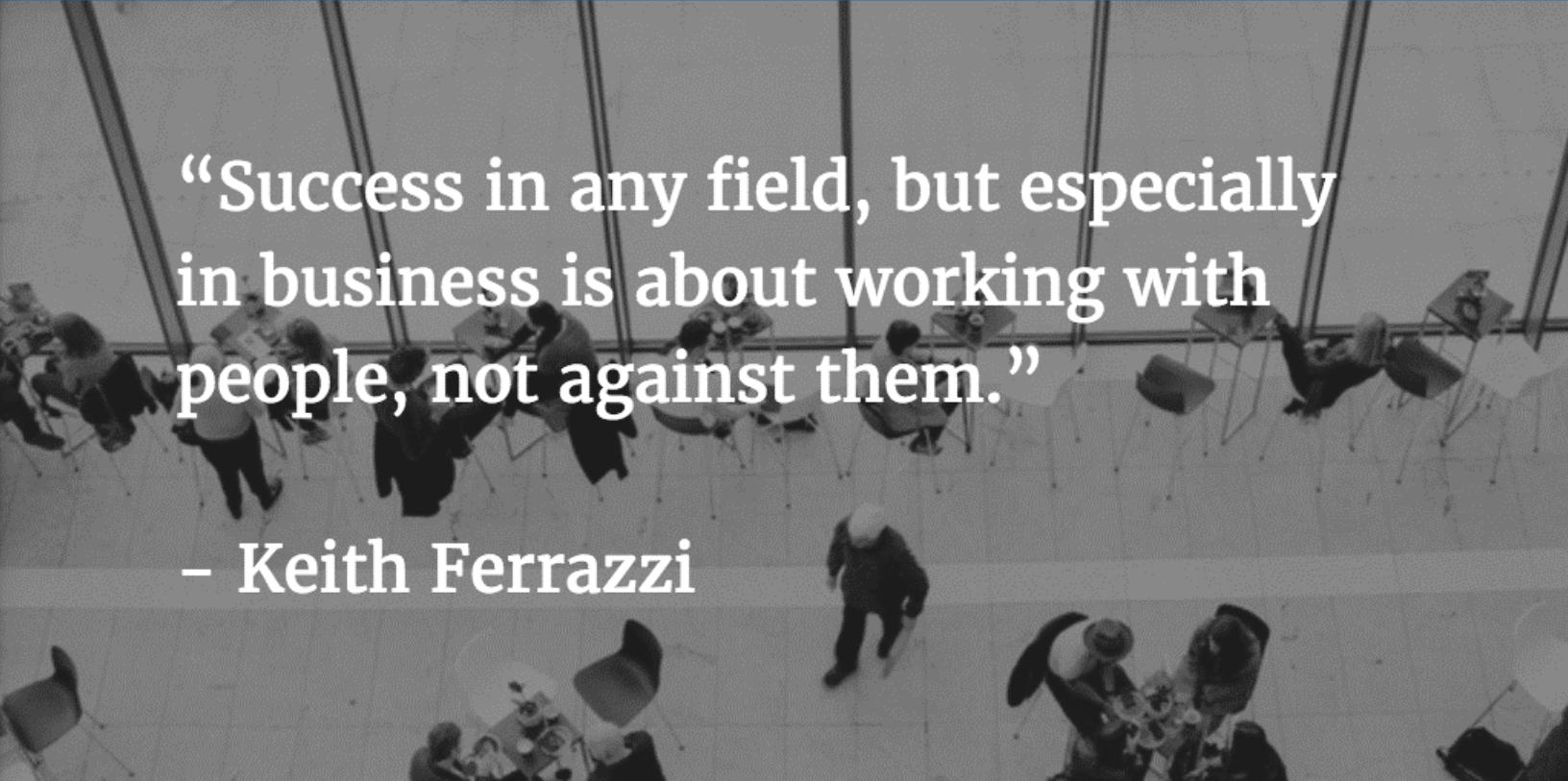
**“The currency of  
real networking is  
not greed but  
generosity.”**

-Keith Ferrazzi



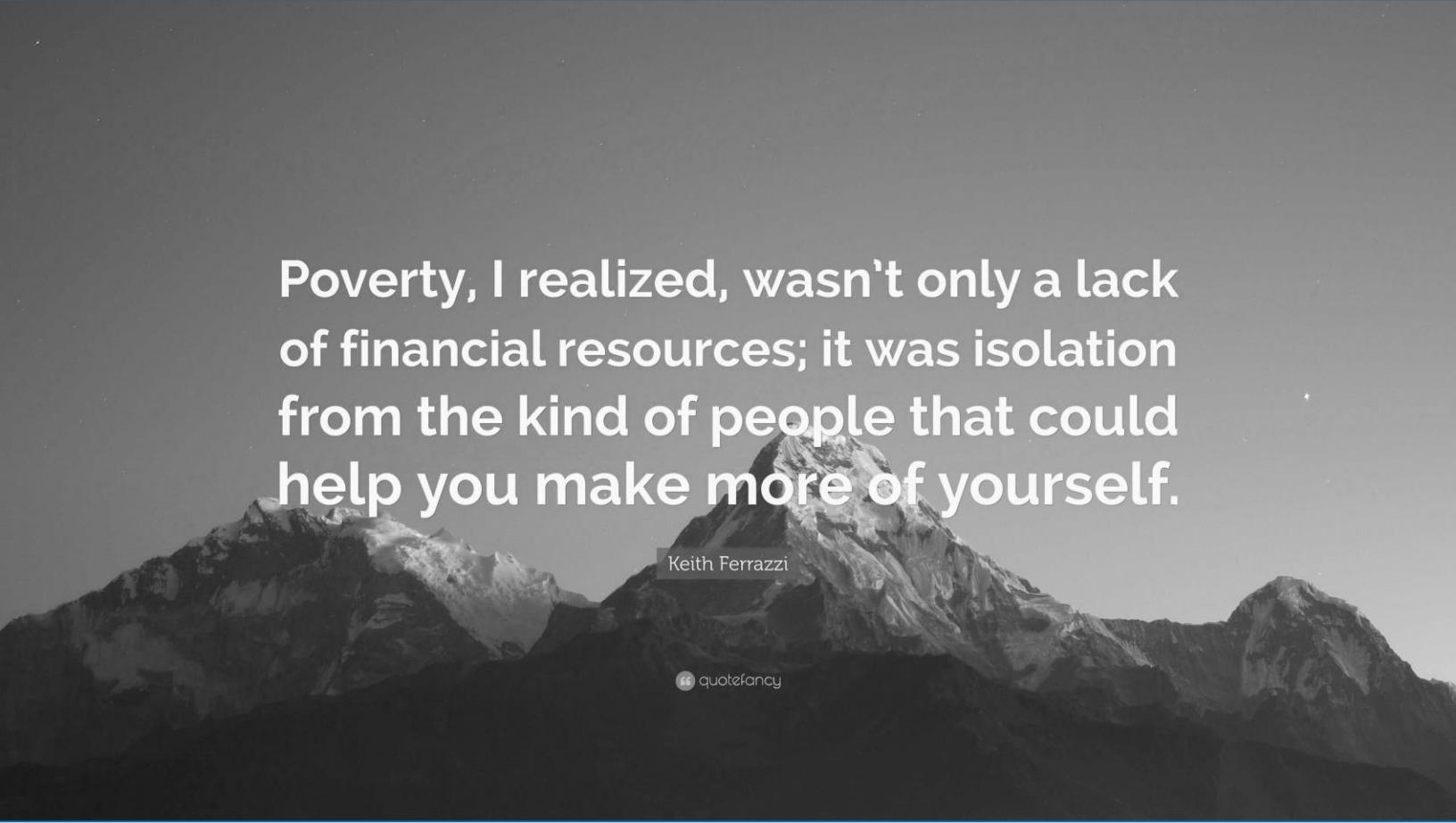
# Networking

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“Success in any field, but especially in business is about working with people, not against them.”

– Keith Ferrazzi



Poverty, I realized, wasn't only a lack of financial resources; it was isolation from the kind of people that could help you make more of yourself.

Keith Ferrazzi

 quotefancy

# Networking

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**REAL NETWORKING is about finding ways to  
make other people more SUCCESSFUL**

Keith Ferrazzi, Never Eat Alone

## Assignments

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1. **Attendance quiz:** due this Saturday at 11:59pm
  
2. **Networking quiz:** due this Saturday at 11:59pm
  
3. **Completed resume:** due before the start of next class
  
4. **First networking call/meeting screenshots:** due in 2 weeks

## Attendance Word

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