

Javier Tecuatl

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EDUCATION

DePaul University, Driehaus College of Business

Chicago, IL

Bachelor of Science in Business – Finance & Accountancy | Finance Honors Cohort

Expected June 2025

- **GPA: 3.5 / Accountancy GPA: 3.6 / Finance GPA: 3.6** | Dean's List
- **Keeley Scholar Candidate:** Selected into co-curricular program for high-potential, high-performing Finance majors pursuing banking, capital markets, consulting, investment management, private wealth management, and valuation careers
- **Relevant Coursework:** Financial Reporting I & II, Auditing I, Accounting Information Systems, Business Ethics, Business Statistics, Introduction to Finance, Corporate Finance, Data Analytics in Finance, Banking & Credit Analysis, Investment Banking, Wealth Management, Financial Decision-Making Cases

WORK EXPERIENCE

William Blair

Chicago, IL

Private Wealth Management Intern

June 2024 – July 2024

- Supported the middle office by leveraging Wealthscape to edit client accounts, gather and organize information for supervisors, and generate detailed required minimum distribution reports formatted in Excel, aiding daily tasks
- Assisted the front office with the initial phases of client paperwork in Wealthscape, including personal data, investment needs, and account set up information, ensuring accuracy and compliance with firm policies
- Collaborated to develop a portfolio for a simulated client, analyzing their background, challenges, and financial needs to create tailored solutions. Advanced to the final round and presented our pitch to the advisor and firm partners

Ernst & Young

Chicago, IL

Financial Services Organization (FSO) Financial Accounting Advisory Services Intern

January 2024 – March 2024

- Conducted thorough research on banking and capital markets mergers for client presentations. Met tight deadlines while ensuring accuracy and thoroughness of research findings
- Executed high-profile projects in finance optimization, strategic transactions, and sustainable finance, showcasing a solid grasp of complex financial concepts and fostering long-term client relationships in a dynamic environment
- Performed reconciliation tasks by comparing client data with provided Excel files, rectifying discrepancies to ensure data accuracy. Findings were presented to client, enhancing their understanding of their company's financial position

First Trust Capital Management L.P.

Chicago, IL

Compliance Intern

July 2023 – August 2023

- Executed a thorough SEC Rule 206(4)-7 review, ensuring meticulous adherence to firm policies and procedures
- Reviewed 1% of all emails sent and received in a year to ensure compliance with SEC regulations
- Assessed 60+ employee social media and political contributions, upholding a high standard of code of ethics compliance
- Performed Blue Sky Law tests for state securities law compliance, mitigating financial penalties and reputational risks

CIBC U.S.

Chicago, IL

Commercial Banking Externship / Case Competition

April 2023 – June 2023

- Acquired extensive banking knowledge with guidance of CIBC professionals in immersive ten-week program
- Built a three-statement, covenant, and valuation model to project a \$400 million syndicated loan deal
- Constructed a 21-page loan proposal highlighting: key aspects of the deal, risks and mitigants, financial projections, covenants, risk rating, downside breakeven scenarios, comprehensive industry information
- Presented final loan proposal to associate MD and worked through tenacious questioning for 45 minutes

LEADERSHIP EXPERIENCE

Association of Latino Professionals for America, DePaul University Chapter

Chicago, IL

Director of Campus Recruiting

March 2023 – Present

- Encourages campus diversity and inclusion by fostering connections among 183 Latin community members through collaboration with professional organizations. Additionally, serves as a reliable resource for students in times of difficulty
- Raised over \$300 in fundraising for ALPFA DePaul Chapter by organizing and setting up a fundraiser. This contributes to the organization's financial stability, enabling it to continue its vital initiatives and programs at DePaul University

SKILLS, ACTIVITIES & INTERESTS

Certifications: FINRA Securities Industry Essentials (SIE) Exam, Adventis Financial Modeling Certification Level I & II, PowerPoint by Wall Street Prep, Bloomberg Market Concepts, CFA Institute Investment Foundations Certificate

Activities: Association of Latino Professionals for America, DePaul Inclusion in Finance, Student Finance Association

Interests: Dog walking, attending concerts, reading, playing volleyball, and bike riding