

## EXPERIENCE

### **STS Capital Partners**, Charlotte, NC

October 2015 – Present

#### *Senior Associate, Mergers & Acquisitions*

- » Managed all aspects of the transaction process across 11 deals, from drafting the initial pitch books through development of the financial models, writing the executive summaries and confidential information memoranda, assisting in the creation of the management presentations, and preparing materials for operational, legal and financial due diligence.
- » Coordinated with the senior management teams to construct industry maps to identify a range of potential buyers.
- » Conducted in-depth industry and market research to assist in the targeting of potential clients and creating pitch materials.
- » Crafted tailored messaging to highlight the specific value propositions relative to individual buyers.

### **align5**, Charlotte, NC

October 2015 – Present

#### *Senior Associate*

- » Conducted in-depth market research, detailing industry overview and trends, recent mergers and acquisitions, as well as financial performance of industry leading companies.
- » Constructed presentations for strategy sessions to synthesize and drive discussion points.
- » Created consultative materials for small business clients on various topics, including client engagement, valuation analysis, and Net Promoter Scores.
- » Sourced and performed operational and financial due diligence on potential acquisition targets.

### **Red Ventures**, Charlotte, NC

May 2014 – October 2015

#### *Digital Marketing Associate*

- » Presented learnings and performance results from account and campaign testing to senior leadership during monthly business review sessions.
- » Conducted full-funnel, thorough analyses of digital marketing campaigns, factoring in revenue, budget, sales conversion and yield data to drive greater profitability as well as efficiency and effectiveness for the business.
- » Designed and optimized A/B and multivariate tests to drive performance across several accounts and partnerships.
- » Created monthly costs forecast, accounting for weekly growth and year-over-year trends, and conducted actual to forecast variance analysis.

### **Social Chair LLC**, Charlotte, NC

November 2010 – June 2014

#### *Founder*

- » Prepared quarterly financial forecasts utilizing market size and adoption rate, recent sales trends and seasonality.
- » Developed marketing strategies and sales techniques utilized in 7 markets through the United States, including social media, direct mailings, and other market specific niche techniques.
- » Designed recruitment processes responsible for all sales and web development hires, conducting interviews, both behavioral and technical, to ensure the quality of applicants.

### **Bank of America**, Charlotte, NC

February 2010 – April 2011

#### *Corporate Debt Products Analyst – Mining and Industrials*

- » Constructed financial models and internal profitability models to assess cash flow, liquidity, and debt capacity of portfolio companies and to forecast the impact of potential future allocation of new credit facilities.
- » Wrote memoranda to assess transactions, including syndicated, sole-bank, and bridge facilities, identifying key credit issues and analyzing sources of debt repayment.
- » Researched, wrote and presented quarterly financial and industry analyses in support of company specific and portfolio level decisions.
- » Managed credit exposure associated with Foreign Exchange, Derivatives, and Treasury Management products.

## EDUCATION

### **Wake Forest University**, Winston-Salem, NC

May 2008

- » Bachelor of Science in Mathematical Economics with minors in Entrepreneurship and Social Enterprise, and International Studies.
- » Relevant Course Work: Quantitative Analysis, International Finance, Introduction to Financial Accounting, Introduction to Managerial Accounting, Microeconomic Models, Macroeconomic Models, Econometrics

## PERSONAL

- » **Skills:** Highly proficient in Microsoft Office Suite (Word, Excel, PowerPoint), Salesforce.com, CapitalIQ, Pitchbook, Adobe Suite (Illustrator, InDesign, Photoshop), Google AdWords and Bing Ads
- » **Interests:** Golf, Twentieth-century literature, Cooking, Philadelphia and Wake Forest University sports teams