

Annie Guo

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EDUCATION

University of Toronto

Toronto, ON

Bachelor of Commerce, Specialist in Finance and Economics, CGPA: 3.63/4.00 (82%)

Expected Graduation: May 2023

- **Honours:** Dean's List Scholar
- **Scholarships:** Pepsi-Cola Scholarship (2019), BC Achievement Scholarship (2019)
- **Relevant Coursework:** Financial Markets, Financial Accounting, Capital Market Theory, Introduction to Corporate Finance
- **Organizations:** JPMorgan Winning Women, Morgan Stanley Early Insights, TD Securities Women in Leadership

PROFESSIONAL EXPERIENCE

Ontario Teacher's Pension Plan (OTPP)

Toronto, ON

Due Diligence & Advisory Summer Intern

Summer 2021

- Scheduled to complete a 17-week internship with the Due Diligence & Advisory team of Ontario Teacher's Pension Plan, Canada's largest single-profession pension plan with \$221.2B in net assets

Huntstone Capital

Toronto, ON

Private Equity Analyst

Winter 2021

- Conducted due diligence through screening over 500 companies per week and conducted financial analysis of acquisition targets
- Identified potential areas of investment by reviewing databases and preparing presentations & reports for team discussion

Selected Transaction and Sector Experience:

- Potential Investment in a Canadian Biotechnology Company
 - Attended weekly diligence meetings with the Huntstone team to discuss diligence progress and analyze investment targets
 - Provide management with additional financial performance concerns to address on calls with target company executives
- Potential Investment in the Industrial Services Sector
 - Drafted outreach emails to over 20 Huntstone target leads per week in the Industrial Services and IIoT sector
 - Prepared weekly reports and reviewed CIMs to assess the opportunities and risk areas of potential acquisition targets

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

Toronto Student Investment Counsel (TSIC)

Toronto, ON

Senior Analyst

Apr 2021 – Present

- Prepared an investment memorandum on Urban Outfitters, Inc. (NASDAQ: URBN) issuing a buy recommendation
- Scheduled to attend technical workshops including accounting, valuation, and M&A topics with upper-year mentors and alumni

Rotman Commerce Finance Association (RCFA)

Toronto, ON

Director of Events

Feb 2021 – Present

- Invited over 100 attendees across North American universities for the Women in Investment Banking event
- Worked with the Events Committee to create virtual experiences for Rotman Commerce students during the Covid-19 pandemic
- Liaised with the Marketing and Corporate Relations portfolios in successfully planning and executing 7 annual events, connecting over 500 Rotman Commerce students and 60 external participants with finance industry professionals
- Previously Events Associate (2020) and First-Year Intern (2019)

Association of Canadian Intercollegiate Investment Clubs (ACIIC)

Toronto, ON

Analyst

Oct 2020 - Present

- Prepared for a stock pitch competition by researching key sector themes and generated thesis points to support recommendation
- Presented investment recommendation on Manchester United (NYSE: MANU) and received 3rd Place at the ACIIC Fall Stock Pitch
- Competed in a Short Investment Conference and provided a recommendation on (NASDAQ: COKE) and (NYSE: SEE) with a team of 7 students from various ACIIC chapters across universities in Canada

Portfolio Management Group (PMG)

Toronto, ON

Junior Analyst

Sep 2020 – Present

- Participated in ongoing training and created weekly technical deliverables including industry analysis and equity research topics
- Worked closely with the broader team in developing thorough company analyses and quarterly updates for portfolio companies
- Prepared and presented detailed stock pitch reports on the Information Technology sector to alumni and industry professionals
- Received finance technical training from the Marquee Group including Valuation I and Valuation II courses

SKILLS & INTERESTS

Technical Skills: Microsoft Office Suite (Excel, PowerPoint, Word), S&P Capital IQ, Factset

Languages: Native in English and Mandarin Chinese; Conversational Proficiency in Spanish

Interests: Art (1st Place at the 2017 Yang Ming International Painting Competition; volunteered as an art teacher; painted for 15 years), fashion design (Nordstrom Fashion Ambassador 2018), food (exploring diverse cuisines and recipes), music (played flute for 6 years)

International Travel: Travelled across Asia (China, Hong Kong, Taiwan, Thailand, Malaysia), Europe (England, Italy, Spain, Monaco, Denmark), and the Americas