

Jim Phan

Boston, MA • jimphan.usf@gmail.com • (857) 506-9266 • in/jim-phan

EDUCATION

University of South Florida (USF), Muma College of Business

B.S. Finance & B.S. Quantitative Economics and Econometrics

Tampa, FL

May 2027

GPA: 4.0/4.0

- **Awards:** 1st place in Junior Enterprise KPMG Case Competition, \$20,000 Green & Gold Academic Scholarship, Dean's List
- **Programs:** Goldman Sachs Emerging Leaders Series (FICC and Equities), Fannie Mae Next Up Program, SEO Alpha Academy, Wall Street Direct, JP Morgan Career.edYOU Academy, McKinsey & Co. Forward Learning Program, Project Destined Fellow
- **Relevant Coursework:** Business Statistics I, Economics – Intermediate Price Theory, Principle of Financial Accounting

PROFESSIONAL EXPERIENCE

Bain & Company

Workday System Analyst Intern

Boston, MA

July 2024 – Present

- Processed 300+ Workday helpdesk tickets and feature requests from internal stakeholders by identifying risks and developing solutions to help maintain system stability and improve workflow efficiency.
- Revamped and improved 250 pages of internal Workday onboarding guidelines to assist new hires with recommendations being rolled out globally using Bain Toolbox, an internal tool developed by Bain to increase efficiency in making PowerPoint decks.
- Tested and released new Human Capital Management, Report, and Time & Absence features to enhance systems and processes.
- Participated in employee training sessions on tools (PowerPoint, Excel, Tableau, Alteryx) and skills (Agile, Answer First, 80/20).

EXTRACURRICULAR ACTIVITIES

Investment Club at USF

Consumer Sector Equity Research Associate

Tampa, FL

May 2024 – Present

- Collaborate with 2 Global Investment Research members to provide equity research reports with a hold period of 12 – 18 months.
 - September 2024: Hold recommendation for Lululemon Athletica Inc. (LULU) based on the solid financial position with \$1.6 billion in cash and a -14% in inventory, combined with EPS +18% and the firm's repurchase of \$1.2B in stock YTD.
- Participated in 150+ hours of intensive training in analyzing financial statements, researching industries, and building 3-statement models while using DCF, multiples, and precedent transactions to evaluate companies.
- Chosen as 1 of 11 top-performing students to join the highly selective Finance Career Compass program to receive direct mentorship from finance professionals at top firms, including KeyBanc Capital Markets (New York) and Capital Group (Los Angeles).

Jade Bridge Capital

Co-Founder, Equity Research Associate

Remote

April 2024 – Present

- Wrote 2 equity research papers recommending buying Penn Entertainment and VFC Corporation using the SOTP valuation method.
 - July 2024: Buy recommendation for V.F. Corporation (VFC) based on its \$1.5B cash deal to sell Supreme, which is expected to enhance balance sheet flexibility and normalize its debt levels. It implies a 12.9x LTM EV/EBIT and a 2.8x LTM EV/Sales.
- Proposed a branding kit and created Slide Master templates in PowerPoint for reports and weekly quick recap posts on LinkedIn.
- Conducted weekly research on global market news; topics included world investing trends, emerging markets, and rising stocks.

HEXA Consulting Junior Enterprise

Vice President

Tampa, FL

April 2024 – Present

- Manage a team of 30 USF students, allocating resources to 10+ local clients to consult on business development and operation plans.
- Forecasted and analyzed funding plan with the Finance Director and President of HEXA to organize 10 events for USF students.
- Organized 10+ public events, including case study review sessions and experience workshops from top consulting firm professionals.
- Published management consulting guides on crucial interview topics, including brain teasers, market scale, and behavioral preparation.

Project Manager

October 2023 – May 2024

- Managed 7 consultants to craft financial statement templates, market expansion plans, and branding kits for 2 companies in Tampa.
 - An example includes a Chinese restaurant that is also a coffee shop, whereby we analyzed the company using a SWOT framework and developed a 6-month marketing campaign, alongside a 20-page pitch designed to distribute the work among 10 employees.
- Developed dynamic dashboards using Tableau and Power BI to visualize financial reports and marketing strategies.

Little Stars Science Club

Co-Founder, Finance Analyst, Program Associate

Ho Chi Minh City, Vietnam

June 2015 – August 2023

- Organized 100+ for-profit programs to expand experimental STEM education to 2,000+ children between 6 to 15 years old.
- Distributed \$10,000 to conduct non-profit STEM events for children in rural areas and supply students with necessities.

CERTIFICATIONS, SKILLS, AND INTERESTS

Certifications: CAIA Fundamentals of Alternative Investments Certificate, Microsoft Office Specialist Master 2019 (Word & Excel Expert, PowerPoint), Fundamental of Data Analysis in Excel, Power Query Fundamentals (CFI)

Technical Skills: Excel, PowerPoint, Power BI, Tableau, Alteryx, Financial Modeling, ServiceNow, Workday, Jira, Capital IQ

Interests: Wall Street Journal, Trading, Created the “Bit & Tip” podcast in Vietnamese, Flag Football, Running, Ping-Pong, Lionel Messi

Languages: English (fluent), Vietnamese (native)