

# ANDREW LU

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## EDUCATION

**University of Illinois at Urbana-Champaign – Gies College of Business**

*Expected Graduation: May 2021*

*Bachelor of Science in Finance, Bachelor of Science in Accountancy*

**GPA: 3.74/4.00**

**Illinois Investment Banking Academy**

*President*

- One of 28 students admitted to a highly selective organization tailored to careers in investment banking
- Track program includes coursework in financial statement analysis, valuation modeling, M&A and advanced corporate finance
- Led and taught a class of 30 students in areas of advanced finance to prepare them for careers in investment banking

## EXPERIENCE

**William Blair** – Chicago, IL

*May 2020 – August 2020*

*Incoming Investment Banking Summer Analyst*

**AHR Growth Partners** – Chicago, IL

*May 2019 – August 2019*

*Investment Analyst Intern*

- Assisted a merchant bank that invested and focused on lower middle-market high growth consumer and retail business
- Worked and collaborated directly with the founder of the firm who was a former managing director
- Conducted in-depth research in the consumer packaged good and retail space that aided in investment decision-making
- Sought potential strategic and financial buyers for a sell-side pitch involving a popular juvenile consumer package goods company

**NZ Opportunity Partners** – Auckland, New Zealand (Work Remotely)

*April 2018 – October 2019*

*Investment Analyst Intern*

- Provided analytical and research support for a private equity search fund targeting lower middle-market New Zealand businesses
- Prepared deliverables directly for a former investment banking Vice President
- Researched a variety of industries and identified potential acquisition targets that fit within the search fund's scope
- Completed LBO models and returns analysis for two potential acquisitions
- Performed due diligence on two target acquisitions in the aftermarket automotive equipment space

**Margolis Market Information Laboratory** – Champaign, IL

*August 2019 – Present*

*Teaching Fellow*

- Taught workshops about how to use different financial software such as S&P Capital IQ, Excel and Bloomberg
- Developed lesson plans for various bootcamps ranging from financial modeling to valuation and pricing
- Helped students improve upon their respective projects that involved the financial software in one-on-one sessions

**Graduate-Upper Division Housing** – Champaign, IL

*August 2018 – May 2019*

*Resident Advisor*

- Managed over 60 upper-classmen residents and resolved issues on diversity, social justice and academic performance
- Part of a staff of 13 responsible for managing the overall culture in the residence hall and cultivating healthy relationships

## LEADERSHIP

**Illinois Gies College of Business** – Champaign, IL

*Business 101 Course Manager*

*June 2019 – Present*

- Managed daily operations of one of the largest courses in the Gies College of Business involving over 800 students
- Led 63 undergraduate section leaders and six graduate student readers to coordinate weekly lessons for the class
- Served as a core member of the Course Management Team which developed and executed curricular content for new students
- Planned the logistics of five lectures and 29 discussion sections as well as debrief meetings and various academic departments

*Business 101 Section Leader*

*August 2018 – Present*

- Facilitated weekly classes for 25 – 30 freshmen students on business ethics and professional responsibility every Fall semester
- Mentored students on career paths and provided advice on personal and professional topics
- Worked alongside faculty members and fellow section leaders to further develop the curriculum for Business 101

**Investment Portfolio Organization** – Champaign, IL

*August 2019 – Present*

*President*

- Headed a team of five in a transition to strengthen the position of the organization within the broad Gies College of Business
- Taught members in stock valuation techniques including an analysis on discounted cash flows and comparable companies
- Corresponded with other executive members to establish consistent and engaged membership for the organization

## DISTINCTIONS

Edmund J. James Scholar ▪ Dean's List ▪ Crowe Case Competition – 1<sup>st</sup> Place ▪ Illinois IBA Case Competition – 1<sup>st</sup> Place

## ACTIVITIES & INTERESTS

Tennis ▪ Hiking ▪ Stand-Up ▪ Dan Brown (Author) ▪ A24 Productions ▪ Alpha Sigma Phi Fraternity ▪ *The Farewell* (Film)