



Taylor Loomis

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PROFESSIONAL SUMMARY

High-achieving professional offering 5+ years of financial industry experience looking to transition into technical product management. Well-versed in market trends, software engineering and SaaS business structures. Concise and decisive communicator with organizational, multitasking and project management talents.

SKILLS

- Business Development
- Financial Management
- Market Analysis
- Agile
- Project Management
- Team Leadership
- Technical Analysis
- Software Development
- R
- JavaScript
- SQL
- MERN Stack

WORK HISTORY

SENIOR ASSOCIATE, INVESTMENT BANKING

07/2015 to CURRENT

Arrowroot Advisors, LLC | Los Angeles, CA

- Worked on 35+ debt and equity financing transactions primarily in the SaaS and technology industries
- Deal Sourcing: conducting industry research and participating in management interviews to assess incoming deals
- Company Evaluation: performing due diligence, analyzing financial statements, and determine capital raising needs
- Client Management & Communication: collaborating with management teams to determine compelling ways to present business highlights to investors; drafting pitch books, engagement agreements, management presentations, deal teasers, and confidential information memorandum.

FINANCIAL ECONOMIST

08/2014 to 07/2015

Vitreous Partners, LLC | Santa Monica, CA

- Analyzed economic issues related to financial markets and institutions
- Analyzed savings, investments and risk in regards to financial portfolios and fund indexes
- Created a sustainability division of the company to focus on impact investing through client investment platforms
- Prepared reports, tables, and charts and present research results
- Wrote press releases and newsletters

EDUCATION

Bachelor of Arts | Economics, International Studies, French

05/2015

Pepperdine University, Malibu, CA

- Graduated magna cum laude

CERTIFICATIONS

UCLA Extension Los Angeles, CA

- Full Stack Web Development Coding Program

VOLUNTEERING

- Junior League of Los Angeles
- Alpha Phi Sorority