

YUFAN ZHAO

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EDUCATION

University of California, Los Angeles | June 2026

Cumulative GPA: 3.83/4.0

Bachelor of Arts in Economics & Bachelor of Science in Statistics and Data Science

Relevant Coursework: Corporate Finance, Accounting, Data Analysis, Economic Forecasting, and Asset Valuation

Honors & Awards: UCLA Dean's List; High School Valedictorian; President's Volunteer Service Award

PROFESSIONAL EXPERIENCE

Wellesley Hills Financial | Los Angeles, CA

May 2025 – Aug 2025

Investment Banking Summer Analyst, Financial Technology

- Created CIMs detailing company financial, operational capabilities, and growth opportunities to support buyer targeting
- Built financial models, incorporating revenue build-ups, expense drivers, and sensitivity analyses to assess valuation impact
- Conducted industry research and market sizing, analyzing competitive dynamics, growth drivers and consolidation trends

Selected Deal Experience:

- *Sale of a Global IT Consulting Services Firm to Strategic Buyer for ~\$150 million*
 - Created an operating model integrating pricing strategy assumptions, staff utilization and margin projections
 - Benchmarked performance against comparable companies to assess profitability, efficiency, and market position
 - Collaborated with senior members of the team to prepare a CIM and a management presentation for buyer meetings
- *\$10 million Capital Raise for a B2B Payments Platform Company*
 - Built a financial model to evaluate capital deployment strategies and determine the optimal capital raise structure
 - Sourced a diverse range of strategic investors across APAC and the U.S., evaluating each prospect's investment history, portfolio alignment and strategic objectives to optimize outreach efforts for the capital raise process
 - Prepared investor materials articulating growth strategy and valuation rationale to secure engagement from investors

Vermillion Rock Advsnr | St. George, UT

Jun 2024 – Aug 2024

Investment Banking Summer Analyst, Industrials

- Reviewed company financial statements to build DCF models to assess the general financial soundness of the companies
- Sourced acquisition targets for PE clients, focusing on supply chain capabilities by assessing customer concentration

Selected Deal Experience:

- *Sale of a Firearm Component Company to a Strategic Buyer*
 - Projected demand drivers in sporting markets by analyzing historical data to quantify potential revenue growth
 - Analyzed acquisition targets, identifying high-strategic-fit companies with synergies (cost reduction, revenue growth, and operational efficiencies) through financial modeling, market overlap assessment and competitive benchmarking
 - Supported vendor due diligence, identifying potential deal risks through financial analysis to enhance buyer confidence

Springer Capital | Chicago, IL

July 2023 – Sep 2023

Private Equity Summer Analyst

- Built acquisition models incorporating sensitivity and stress tests to evaluate cash flow resilience, DSCRs, and return profiles
- Evaluated acquisition targets via due diligence, including financial modeling, operational assessment, and market risk analysis
- Prepared presentation materials outlining deal rationale, post-acquisition value creation opportunities and key risks for IC

LEADERSHIP AND EXTRACURRICULAR

HanHan Comic | Los Angeles, CA

Dec 2022 – Present

Co-Founder & CFO

- Founded a collectible business partnering with influential Marvel artists on Certified Guarantee Company (CGC) signed comics
- Monitored financial statements and built an operating model to forecast performance and assess cash flow needs
- Identified and executed operational cost-saving initiatives (e.g., supply chain optimization) and implemented a just-in-time (JIT) inventory model for high-value comic book collectibles, reducing holding costs by 15%

Pi Sigma Epsilon | Los Angeles, CA

May 2025 – Aug 2025

Director of Performance Management

- Led 15+ members to develop an integrated marketing communication strategy (IMC) for an international gaming company
- Presented marketing strategies to C-level clients, supporting digital outreach campaigns that reached 5,000+ new users

SKILLS & INTERESTS

Language: Chinese (Native); **Skills:** Financial Modeling, Capital IQ, R programming, Pitchbook, and Microsoft Office Suite

Interests: Film, Comic Book Collecting, Traveling, Pickleball, and Volunteering