

# STEVEN GOETZ

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## EDUCATION

### Princeton University

Princeton, NJ

*Intended A.B. Economics/Computer Science; GPA: 3.96/4.00 | ACT: 36*

*May 2028*

**Minors:** Finance and Statistics & Machine Learning

**Awards:** 3× Departmental Distinction (A+), Pari Passu Restructuring Case Competition (Top 2%), Princeton Pitch Competition (1st Place), Princeton Output Pitch Competition (2nd Place), University of Florida Stock Pitch Competition (Finalist)

## WORK EXPERIENCE

### TD Securities

New York, NY

*Incoming Investment Banking Sophomore Summer Analyst (Financial Institutions Group)*

*June 2026 – August 2026*

### Cross Keys Capital

Fort Lauderdale, FL

*Investment Banking Summer Analyst (Generalist)*

*May 2025 – August 2025*

- Supported \$200M+ in active M&A and capital raise mandates across industrials, aerospace, and SaaS; built teasers, buyer lists, CIMs, valuation materials (public comps, precedents, DCFs), virtual data rooms, and sponsor meeting briefings
- Project Slab (Luxury Stone Distribution, \$25M Sell-Side):* Acted as sole analyst leading execution; built full sell-side materials, modeled 3-year projections with normalized margins, and maintained direct communication with the founder and buyers through the IOI deadline. Achieved buyer interest centered on exclusive stone rights and 19.9% EBITDA margins
- Project Repair (Aerospace MRO, \$11M DCM):* Executed debt raise to fund a majority equity buyback; structured the pro forma capital stack and forecasted free cash flows under stressed scenarios for lender-facing materials

### CenterSquare Investment Management

Conshohocken, PA

*Real Estate Private Equity Winter Analyst*

*December 2024 – January 2025*

- Gained exposure to real estate private equity through \$200M+ deal reviews, focusing on acquisitions and leasing strategies
- Analyzed IRR (12–18%) and MOIC (1.5x–2.2x) across multifamily, office, and retail assets through case studies and LBOs within a \$14B+ AUM portfolio, suggesting acquisitions tailored to opportunistic and core-plus strategies

### DeAP Learning Labs, LLC

Durham, NC

*Co-Founder, Chief Strategy Officer, 2nd Largest Equity Holder*

*March 2023 – August 2025*

- Led strategy and operations for an AI ed-tech company, managing a 45-member team and scaling to 80K+ users
- Achieved \$3M valuation, secured partnerships with 10 creators (2M+ subscribers), and answered 1.1M+ student questions

## LEADERSHIP AND COMMUNITY INVOLVEMENT

### Tiger Investments

Princeton, NJ

*Treasurer, Summer Education Lead*

*May 2024 – Present*

- Manage treasury operations and capital budgeting for Princeton's premier student investment club (~3% acceptance rate), coordinating with the university to fund Princeton's only open-access finance education sessions for ~80 students weekly
- Lead Semiconductors coverage and previously covered Financial Institutions, producing stock pitches across both groups
- Build the club's restructuring presence by coordinating Lazard Rx and PJT Partners Rx visits, facilitating LME and Chapter 11 case studies, and partnering with Lazard to integrate their Rx curriculum into formal member training

### Princeton Student Ventures

Princeton, NJ

*Director of Investments Team*

*August 2024 – Present*

- Source Princeton startups for \$10K+ grants and forge pipelines for early follow-on funding with YC and Pear VC
- Oversee \$200K+ fund and lead ~50 members; launched the first entrepreneurship event for Admitted Students Day
- Sole freshman selected for Princeton's AI Tiger Trek; expanded partnerships to five new VCs supporting student portcos

### Entrepreneurship Club

Princeton, NJ

*Executive Board, Head of Finance, Founder of PrincetonBuilds*

*August 2024 – Present*

- Oversee finance and external communications for Princeton's largest club (400+ members), managing \$30K+ budget to host events featuring top finance and technology executives; launched PrincetonBuilds, unifying all entrepreneurship clubs

## ADDITIONAL INFORMATION

**Activities:** SEO Edge (Alternative Investments and Investment Banking Track), Princeton Private Equity Club, Project Wall Street (Financial Restructuring Track), Grata Scholars (Special Situations Group), Project Destined (Real Estate Private Equity)

**Languages:** Hebrew (fluent), Spanish (working proficiency), Python, Java, Stata, VBA, R, Rekordbox

**Interests:** Marathons, DJing, Backcountry Skiing, Salmon Fishing, NFL, Latin Cuisine, Golf, Chess, Alcohol Distillation