

# NAME

TITLE

000-000-0000 / EMAIL / CITY, STATE, ZIP

## Profile

I'm an experienced and results-driven investment banking managing director with over 15 years of experience securing transactions and increasing business. I have a proven track record of satisfied clients ready to continue leading successful transactions and leverage my skills and experience in the industry within a successful financial institution.

## Experience

### Associate Director - Company / Location

*MONTH YEAR - Present*

- Provided strategic instructions alongside other directors for a variety of clients.
- Built and maintained relationships with clients to ensure they continued to do business with us and were happy with their financial status.
- Mentored junior investment bankers on successful techniques and strategies to help drive business.
- Analyzed the financial standings of the company every month.
- Collaborated with the managing director on goals, objectives, and the proper strategies to achieve the set goals.

### Investment Banker - Company / Location

*MONTH YEAR – MONTH YEAR*

- Conducted financial analysis using scenario analysis and valuation.
- Monitored clients' financial standings.
- Performed market research to identify potential risks, trends, and opportunities.
- Assisted senior investment bankers with mergers and acquisitions.
- Participated in business development and client relationship building to drive more business to the company.

### Project Experience

- I assisted with leading and executing M&A transactions that brought high-value commissions to the company.
- Created the company's current strategic plan that indicates what is needed for the next ten years.

## Education

### Master's in Finance - University of Tampa

*MONTH YEAR*

- GPA: 3.5
- AWARD
- AWARD

### Bachelor's Degree in Business Administration - Tampa High School

*MONTH YEAR*

- GPA: 3.8
- AWARD
- AWARD

## Skills

### Expertise

- Deal execution
- Excellent relationship-building skills
- Business development
- M&A
- Financial acumen

## Licenses & Accreditations

### Licenses & Accreditations

- [Chartered Alternative Investment Analyst \(CAIA\)](#)
- [Financial Risk Manager \(FRM\)](#)
- FINRA Series 79