



The Wharton School Class of 2019 2nd Year Resume Book

Resume Book Details

Academic Year: 2019

Who Can Apply

Student Group(s): 2nd Year MBAs

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NIKHIL BERRY

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Finance, Entrepreneurship & Business Analytics

2017-2019

- Director's List | Member of Wharton's Investment Management, Entrepreneurship, Tech, Analytics, Asia Clubs
- Equity analyst for Wharton Investment Management Fund; Board Member of Wharton's India Economic Forum
- Independently explored machine learning techniques and alternative data approach to fundamental investing

HONG KONG UNIVERSITY OF SCIENCE AND TECHNOLOGY

Hong Kong

Bachelor of Engineering in Computer Science | GPA: 3.83/4.30 (First Class Honors, top 5%)

2009-2013

- Computer Science & University Scholarships; Student Academic Excellence Award; Dean's List; Graduated in 7 terms vs. 8
- Won business plan pitch judged by top HK investors; selected as lead International Student Ambassador; led badminton team
- Led team of 3 to rare A+ in thesis on forecasting stocks trends using data mining of social media; Deemed best project (of 40)

EXPERIENCE

CITADEL LLC

New York

Summer Associate, Tech (Software/Internet) Investing

2018

- Combined fundamental approach with alternative data to gain an edge as part of a team consisting of top-ranked investors
- Conducted deep-dive on tax/accounting software – industry model, trends, growth drivers, software pros/cons, impact of AI/ML; Pitched a long and a short on two major players; long position up ~5% in 4 weeks and was recently added to the portfolio
- Analyzed online dating industry using alternative data sets; sourced idea and built short thesis on a major online dating player based on data trends & product pipeline; pitched to all PMs in the stock pitch competition; only tech pitch to secure top 3 position

TREE LINE INVESTMENT MANAGEMENT (*\$1B+ Asia focused hedge fund with a bottom up approach*)

Hong Kong

Pre-MBA Intern, TMT Investing

2017

- Analyzed growth, management and financial aspects of early-stage startups and public companies in India including largest local search and music streaming companies; recommended long equity investments that returned 20%+ in 4 months
- Conducted study on disruptions in the FinTech space in India; presented investment recommendations and findings to CIO
- Initiated coverage of two companies in the media space; met with company management and evaluated advertising landscape
- Evaluated follow-on investment in India's second largest FinTech startup; presented to startup CEO recommendations on new product features (4 implemented) and ways to substantially lower customer acquisition costs (up to 70%) with partnerships

GOLDMAN SACHS (GS)

Hong Kong

Associate (Engineering), Prime Services (*#1 ranked group in Asia that works with hedge funds, rev. \$1B+*)

2016-2017

- Drove vision and implementation of quant, data-driven FinTech (trading, data analytics, research) platforms and 'Marquee' initiative (next generation trading platform) for top tier hedge funds; consistently achieved top ranking in the global peer group
- Engineered platform that uses data science to optimize portfolio risk and trading strategy; led global team of 8 to develop product; minimized ~\$25M daily risk, automated risk signals, and enabled firm to enter \$50M+ quant fund market in Asia
- Partnered with investment group to evaluate and advise FinTech investments; devised new features for Symphony (\$1B market cap). Partnered with New Business Group and helped grow hedge fund market share by 7% in 2016 with increased tech focus

Analyst (Engineering), Prime Services

2014-2016

- Bolstered firm's research, trend analytics, and automated signaling frameworks; added key capabilities driving higher profits
- Analyzed client needs and developed portfolio optimization platform that extracts accessible yet in-depth insights around cost drivers of clients' portfolios; saved clients up to \$5M/yr, lowered funding cost & retained/acquired 6 clients worth ~\$1M+ each
- Collaborated with quantitative experts to pioneer analytics platform that leverages historical data to model financial outcomes of 170+ possible scenarios on client portfolio performance; avoided estimated \$20M+ losses for clients with actionable insights
- Won Best Innovation Award (100+ entries) for organizing first ever hack-a-thon in Asia and building a unique research app aggregating various China trading metrics; addressed key pain point for funds, saved 4+ hrs/day and improved macro analysis
- Chaired Asia Junior Board; persuaded GS Asia head, conceptualized & launched 'Innovation Labs' where teams of 4-6 build new ideas; supervised team of 6 and leveraged machine learning to tag and parse news articles for alternative data analysis

Graduate Analyst, Prime Services (*former Summer Analyst*)

2013-2014

- Guided team of 2 to improve algorithm used for executing large trades (\$50M+ daily); lowered execution cost per trade by 5%
- Designed solution that reduced time between trade initiation and actual exchange execution; improved execution times by 15%

ADDITIONAL INFORMATION

- **Tech Skills:** Java, SecDB/Slang, SQL, HTML, Bootstrap, Javascript, Mobile apps | Data: R, Python, Machine learning, Cloud
- **Investing:** Active personal investment and altcoin portfolio with focus on high growth potential and strong management
- **Past Positions:** Community Leader/Mentor at Startup Weekend; Co-Founder of App Gali (app development startup)
- **Interests:** Crypto currencies, SaaS businesses, hiking in the Himalayas, DJ mixing, badminton, gaming, coding

ROHIT CHAUDHARY

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA **Philadelphia, PA**
Master of Business Administration Candidate; Major in Finance and Business Analytics **2017-2019**

- Member of Private Equity & Venture Capital Club and Investment Management Club
- 1 of 4 finalists in Boston Investment Conference Stock Idea Contest 2017, Equity Research Analyst for Wharton Investment Management Fund (WIMF)

INDIAN INSTITUTE OF TECHNOLOGY DELHI **New Delhi, India**
Bachelor of Technology in Chemical Engineering (GPA: 9.2/10; Department Rank: 3 of 123) **2008-2012**

- Awards & Recognition: IIT Delhi Merit Award (top 7% of class); BN & Kamlesh Sharma Scholarship 2011 (top all-round performer); B.N. Bharadwaj Award 2010 (top academic performance in department)
- Leadership: President, Alumni Affairs & International Programs (2011-2012); Director, Entrepreneurship Cell (2010-2011)

EXPERIENCE

VIKING GLOBAL INVESTORS **New York, NY**
Summer Investment Analyst **Summer 2018**

- Pitched short idea in consumer sector after identifying structural weakness in most profitable segment of business
 - Idea was added to portfolio; share price declined ~15% after investment during course of internship
- Pitched long idea in automobile sector after establishing differentiated view on business profitability versus consensus
 - Idea became meaningful new position in portfolio after pitching it to CEO and CIO

APAX PARTNERS **Mumbai, India**
Associate, Private Equity **2015-2017**

- Performed business due diligence, built financial models, led management discussions and managed deal documentation
- Focused on healthcare sector in India – identified attractive sub-segments and strengthened network of industry and deal advisors; created 2 proprietary live deal situations by identifying strategic M&A targets for platform assets

Select Deal Experience

- \$660M potential buyout of one of largest lab diagnostics businesses in India
 - Established unsustainability of premium pricing via primary research; led to rationalization of bid value by 10%
- \$320M potential investment in pharmaceutical business to finance transformational acquisition in Australia
 - Formulated investment thesis by establishing M&A strategic rationale and estimating combination synergies

Public Markets Experience

- Identified and evaluated over 20 potential targets for Apax's \$1B public markets fund (LON: APAX)
- Deployed \$20M in 2 pharmaceutical businesses; investments marked at 40% IRR and 2.0x MoM

Portfolio Management

- Designed ESOP plan of Zensar Technologies (IT Services) to realign management incentives in wake of industry headwinds

ADVENT INTERNATIONAL **Mumbai, India**
Analyst, Private Equity **2014-2015**

- Evaluated over 10 investment opportunities across pharmaceutical and IT services sectors
- Closed Deal: \$320M investment for controlling stake in Crompton Greaves' carved-out consumer durables business
 - Conducted commercial due diligence and developed value creation plan to increase operating profits by 18%
 - Investment marked at 54% IRR and 2.3x MoM

MCKINSEY & COMPANY **Delhi, India**
Business Analyst **2012-2014**

- Led team of 15 to transform manufacturing operations of leading pharmaceutical player; optimized global network of 7 manufacturing facilities and increased throughput of flagship plant by 20%
- Performed industry and commercial due diligence on pharmaceutical targets for two private equity clients

ADDITIONAL INFORMATION

- **Internship:** Ranbaxy, India's leading pharmaceutical player – optimized development process of high-value drug (2011)
- **Interests:** Graphic Design (freelanced for corporates and designed for 10+ national student festivals), Painting and Traveling

YUMIN CHEN

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate, Major in Finance

2017-2019

- Equity Research Analyst for Wharton Investment Management Fund, an USD 2 million student-run value equity fund
- September 2017 Wharton Investment Management Club Team Stock Pitch Competition attendee
- Member of Investment Management, Tennis, and Asia clubs
- Awarded Joseph Wharton Fellowship for outstanding professional, leadership and academic achievements
- GMAT: 770 (99th percentile)

UNIVERSITY OF INTERNATIONAL BUSINESS AND ECONOMICS

Beijing, China

Bachelor of Economics, Major in Finance

2009-2013

- First Prize Scholarship (top 8%); University Outstanding Student (top 5%); Honorable Mention (second prize) of American Interdisciplinary Contest in Modeling; First prize of China Undergraduate Mathematical Contest in Modeling; Third prize of Business English Negotiation Contest of UIBE

EXPERIENCE

CARO-KANN CAPITAL (*long-short equity hedge fund*)

San Francisco

Equity Analyst Intern

2018 Summer

- Completed research of signed equities on both US and China TMT companies.
- Made investment recommendations to portfolio manager.

BAIDU (*Google's counterpart in China*)

Beijing, China

Senior Investment Manager – Investment and M&A Department

2015-2017

- Closed investment of USD 2m in Series D finance company and investment of USD 3m in Series B commercial device company; led processes end-to-end, including deal-sourcing, due diligence, investment committee presentation, deal documents (term sheet, share purchase agreement, shareholders agreement, business cooperation agreement) negotiations.
- Covered fintech sector with industry-research approach; drafted three in-depth industry research reports in sub-sectors of commercial finance, big data credit analysis, and Robo-advisor, which generated two of Baidu's ongoing deals.
- Participated in execution of cross-border fintech deal of USD 350m; designed optimal deal structure, organized negotiations involving internal finance, legal and business teams, outside financial and legal advisors, and counterparty.
- Led post-investment management of two portfolio companies (commercial device, education); monitored operations, facilitated cooperation with Baidu, evaluated and completed next-round financing.
- Engaged in Baidu's capital operation activities including spin-off deals, MBO of iQiyi (one of China's top three on-line video companies), set-up of Baidu's seed fund with investment focus on media.

FOSUN KINZON CAPITAL (*VC arm of China's largest private-owned investment conglomerate*)

Beijing, China

Analyst

2014-2015

- Collaborated on deal execution of four companies including due diligence, valuation, investment memos, and presentations to Investment Committee (sectors included fintech, e-commerce platform, real estate, B2B).
- Conducted industry research; performed intensive interviews with companies, customers and experts, and authored 110-page fintech industry report and 60-page smart-device industry report for deal screening.
- Proactively leveraged Fund of Funds resources and expertise to organize fundraising from scratch, including drafting Private Placement Memorandum, introducing and interviewing with potential investors, setting up database for LP due diligence.

SAGAMORE INVESTMENTS (*One of the earliest USD Fund of Funds established in China*)

Beijing, China

Analyst

2013-2014

- Monitored market for potential fund investment opportunities; conducted due diligence of more than 10 PE and VC funds, drafted investment recommendations for Investment Committee.
- Managed and monitored 20 invested funds post-investment, including leading funds such as Sequoia Capital, IDG Capital, GSR, CITICPE, etc.
- Conducted research of healthcare mobile app company to evaluate co-investment opportunity, convinced partners to opt out.

ADDITIONAL INFORMATION

- **Interests:** personal investing; acting (First prize of English Drama Competition in college); running (800-meter runner on college track and field team); cooking
- **Languages:** native speaker of Mandarin

DAVID COCHRANE

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA **Philadelphia, PA**
Master of Business Administration Candidate; Major in Business Analytics **2017 – 2019**

- Head Fund Fellow ('18/'19) and Assistant Fund Fellow ('17/'18), Wharton Investment Management Fund; leading a team of students managing ~\$2M equity portfolio of endowment capital
- Semi-finalist, Boston Investment Conference Student Contest; selected as one of eight semi-finalists out of ~50 entries
- Leader of Wharton Investment Management Fund New York Trek

QUEEN'S UNIVERSITY **Kingston, ON**
Bachelor of Commerce, First Class Honours **2008 – 2012**

- Queen's Principal's Scholarship and D.I. McLeod Dean's List with Distinction Scholarship Recipient
- Queen's Finance Association Conference; Co-Chair, Sponsorship Coordinator, First Year Representative, Mentor

EXPERIENCE

CLEARFIELD CAPITAL MANAGEMENT (*\$400M AUM long/short equity hedge fund*) **New York, NY**
Analyst Intern **Summer 2018**

- Analyzed traditional long/short and special situation investment opportunities in the information services, video game publisher, commercial real estate services, specialty finance, and asset management industries
- Formulated investment theses; led interactions with management; prepared financial models; developed company and industry specific analyses; presented investment recommendations to Analysts and PM

CLAIRVEST GROUP (*C\$1.7B AUM private equity firm*) **Toronto, ON**
Senior Associate **2016 – 2017**
Associate **2014 – 2016**

- Analyzed investment opportunities in the gaming equipment, regional casino, industrial cleaning, online lead generation, construction equipment rental, and self-storage industries
- Promoted to Senior Associate on track to Vice President

Select Investment Experience

- Invested \$40M for ~30% equity stake in Accel Entertainment, the largest video lottery terminal operator in Illinois with 1,050 locations and \$35M of EBITDA
 - Developed operational and financial model; analyzed unit economics; conducted scenario and industry analyses; evaluated marketing strategy and collection operations; engaged with senior management regularly post-close
 - Drafted investment memorandum and presented opportunity to investment committee
 - Coordinated Accel team's evaluation of transformative ~\$10M EBITDA acquisition; presented diligence to CEO
 - Served as Board Observer; presented compensation evaluation project to Board of Directors resulting in adjustments to senior executives' option compensation, evaluated facility planning and budgeting matters
- Submitted binding proposal for \$21M investment for ~60% equity stake in industrial cleaning business in the Midwest
 - Analyzed customer stickiness and pricing power in customer relationships by branch; evaluated hub and spoke model to understand margin expansion profile; identified aging fleet and forecast capital expenditure requirements
 - Built operational and financial model; drafted investment memorandum; presented to investment committee

Select Portfolio Company Experience

- Provided ongoing portfolio company support to aviation and defense services company with \$160M in revenue
 - Created scenario analysis and evaluated pricing strategies related to transformative \$70M+ capital expenditure plan to acquire specialty defense assets used to train U.S. and friendly foreign militaries
 - Presented capex financing opportunity to lenders; coordinated diligence; evaluated financing alternatives
 - Coordinated with 10+ member team to lead diligence efforts related to acquisition in military training space

RBC CAPITAL MARKETS **Toronto, ON**
M&A Investment Banking Analyst **2012 – 2014**

- Offered promotion to Third Year Analyst position; consistently reviewed as a top-ranked analyst
- Transaction experience in the healthcare, mining, retail, infrastructure, and telecommunications industries

ADDITIONAL INFORMATION

- Investing and business books I have enjoyed recently: Common Stocks and Uncommon Profits, Double Your Profits in Six Months or Less, Value Investing (Bruce Greenwald)
- Passionate skier; avid traveler (traveled to over twenty countries in Europe and Asia); banjo and guitar player

YI DONG

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Health Care Management

2017 - 2019

- Won 1st place (out of 14 entries in sports retail sector) - 2017 Wharton Investment Management club stock pitch competition
- Placed 2nd (out of 10 top MBA programs) – represented Wharton at 2017 Ross (Michigan) Investment Conference
- Serve as board member of Wharton Investment Management and Digital Health clubs
- Director's List (top 10% GPA), First Year Honor, Recipient of Kaiser Fellowship and Lipman Family Price Fellow
- GMAT: 760 (99th percentile), Integrated Reasoning: 8.0/8.0, Analytical Writing Assessment: 6.0/6.0

GOIZUETA BUSINESS SCHOOL, EMORY UNIVERSITY

Atlanta, GA

Bachelor of Business Administration; Major in Finance and Minor in Mathematics

2007 - 2011

- College GPA: 3.8/4.0, Minor GPA: 4.0/4.0; Dean's List in all four years, Graduated with Distinction

EXPERIENCE

SPRINGS CAPITAL (\$10B AUM long-only hedge fund)

Beijing, China

Summer Investment Analyst

Summer 2018

- Fundamental equity research analyst for the largest hedge fund in China (based on AUM in China A-Share)
- Provided coverage on TMT sector with a focus on China A-Share; screened 100+ companies and generated investment recommendations that resulted in portfolio increases in integrated circuit and passive component manufacturers
- Initiated coverage on Technology sector in Taiwan; produced 20+ investment analyses and reports on semiconductor and electronic component companies
- Conducted due diligence through industry analysis, proprietary research, financial modeling, and management interviews
- Presented industry review and investment recommendations to the global investment team (20+ PMs)

MCKINSEY & COMPANY

New York, NY / Washington, D.C.

Specialist (Expert track), Healthcare Systems & Services Practice

2016 - 2017

Senior Business Analyst (top 10%), Healthcare Systems & Services Practice

2015 - 2016

Business Analyst, McKinsey Solutions

2012 - 2015

Healthcare Expertise

- Engaged 10+ payers, hospital systems, and care centers in 3 years to improve strategy, operations, and technology excellence
- Developed post-merger management plans for a \$54B M&A deal between two top five healthcare insurers with annual combined revenue exceeding \$120B; designed strategies to optimize network efficiency and integrate national health plans
- Advised state governors to launch multi-payer health payment programs improving care access and reducing medical spending on scale of \$45B; recommended \$200M payments to provide technology and care delivery support for doctors and patients

Industry Research and Financial Modeling

- Conducted top-down strategy studies across five industries (financial services, food and beverage, retail and consumer goods, grocery, and healthcare) through market report reviews, consumer surveys, expert consultations, and management interviews
- Built bottom-up financial and valuation models by dissecting business units into granular product, geographic, and consumer categories and estimating revenue driver, growth trajectory, cost trend, and margin requirement for each segment

Advanced Data Analytics

- Created proprietary algorithms to mine strategic insights from medical claims data (UB-04 and CMS-1500 forms) with total transaction volume over \$10T; developed analytics dashboards to streamline decision making for healthcare executives
- Analyzed credit card data over 25B in annual transaction count and \$3T in purchase volume; identified consumer sentiment shifts and behavior changes, product attrition and conversion patterns, and broader industry trends for head of card businesses

ADDITIONAL INFORMATION

- **Additional Experience:** Business Analyst, Argus Information and Advisory Services (2011-2012)
- **Investment:** Manage personal investment account (13+% annualized return since 2011); favorite books include *Common Stocks and Uncommon Profits*, *Margin of Safety*, *The Most Important Thing*, and *Modern Monopolies*
- **Honor:** Shanghai's 1st Gifted Children Program (1 of 36 students selected from 1,000+ applications in China)
- **Languages and Skills:** Native speaker in Chinese (Mandarin) and conversational in German; skilled in SQL, R, and Tableau
- **Interests:** Play harmonica and clarinet; practice traditional Chinese painting and calligraphy; intramural table tennis champion and basketball semi-finalist; avid fan of Houston Rockets, Atlanta Falcons, FC Barcelona, triathlon, and inline skating

JUSTUS FERDINAND GOETTEMANN

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Majors in Finance and Business Analytics

2017-2019

- Wharton Private Equity & Venture Capital Fellow (awarded by Wharton PE&VC alumni association to top PE candidate)
- DAAD Graduate Scholarship (~\$60k value; awarded to top 40 German graduate students in US grad programs each year)
- Finalist, American Bankruptcy Institute Corporate Restructuring Competition (Oct-17)
- Member: Private Equity & Venture Capital, Restructuring & Distressed Investing, Analytics, GUIDE and Tennis Clubs

UNIVERSITY OF OXFORD, LADY MARGARET HALL

Oxford, UK

Bachelor of Arts in Philosophy, Politics and Economics; Double Major in Economics and Politics

2010-2013

- Upper Second Class Honors with First Class Honors in International Relations
- Men's Captain, Boat Club; Project Manager, Oxford Microfinance Initiative; Board Member, Oxford German Society

EXPERIENCE

ELLIOTT MANAGEMENT CORPORATION

New York, NY

Summer Analyst, Situational Investing (MBA Internship)

Summer 2018

- Evaluated activist equity and distressed opportunities in TMT (mobile carriers, satellite providers, spectrum licensees) and Industrial Services; analyzed and identified value creation opportunities (including asset sales, capital allocation, industry consolidation) and refinancing/ distressed scenarios (as applicable)
- **Distressed Caribbean Mobile Carrier** (Unsecured Notes): Evaluated refinancing/distressed exchange scenarios for highly levered EM operator; recommended arbitrage trade along \$6.5bn+ capital structure based on bankruptcy/ covenant analyses
- **US-Based Satellite Providers** (Distressed Debt; Merger Arb): Analyzed several spectrum-related debt and equity opportunities (stand-alone and in context of take-over bids); evaluated underlying economic value of spectrum with specialist advisors

OAKTREE CAPITAL MANAGEMENT

London, UK

Associate, Distressed & Value Opportunities Funds

2015-2017

- Evaluated \$5bn+ of private and public investment opportunities across sectors and asset classes (including stressed/ distressed debt, mezzanine, public equities) with focus on distressed real estate, energy and TMT
- Directed advisor teams in investment due diligence; drafted/ presented memos outlining investment theses, underwriting outcomes, and key risk-return considerations to Oaktree's Investment Committee; closed eight transactions (\$1.5bn+ equity)

Selected Investment Experience

- \$700mm acquisition of NPL portfolio (\$4.5bn of loans) backed by 400 commercial assets from Irish bad bank NAMA
 - Spearheaded diligence and transaction underwriting with legal, real estate and servicing advisory teams
 - Negotiated terms and docs for \$300mm acquisition financing facility with consortium of financing banks
- \$140mm recapitalization of Cannon Kirk, home builder with 4,000+ plot land bank in Ireland, UK and Germany
 - Managed team of legal and commercial experts in company's recapitalization and debt redemption process
 - Led land bank viability analysis with advisors and initiated adjustment of transaction perimeter to exclude \$50mm commercial redevelopment asset in peripheral UK representing inadequate risk-return exposure

GOLDMAN SACHS INTERNATIONAL

London, UK

Analyst, Investment Banking Division, Global Natural Resources Group

2013-2015

- Advised clients on M&A and financing transactions; maintained coverage of 20+ companies in the energy & mining sectors
- Managed project work streams on 15+ completed M&A and cap markets transactions (total deal volume \$45bn+)

Selected Transaction Experience

- Advised Mick Davis (Xstrata founder) on incorporation of \$5.6bn mining fund X2 Resources and acquisition target search
 - Worked as secondee to X2 investment team on detailed mining models and evaluated over 50 public and private targets
- Advised Goldman Sachs Infrastructure Partners on \$2.3bn disposal of their 30% stake in Associated British Ports (ABP)
 - Created bottom-up ports operating model in close cooperation with GSIP and ABP management

ADDITIONAL INFORMATION

- **Leadership:** Co-founder of \$100k seed fund (3.6x MOIC on eight investments as of June-18); Chairman of European Youth Parliament (5,000+ members): Led \$40k fundraising in four months., grew UK membership from 40 to 500 in 12 months
- **Interests:** Outdoors (hiked Munich to Venice in Jul-17), sports (tennis, crew), photography, contemporary art
- **Languages:** German (native), French (intermediate proficiency), advanced diplomas in Latin & Ancient Greek

NIKHIL GOYAL

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA **Philadelphia, PA**
Master of Business Administration Candidate; Majors in Finance, Accounting and Business Analytics **2017-2019**

- *Academic Honors:* Director's List (Top 10% of Class) – Fall 2017; First-Year Honors awardee (Top 20% of Class); Selected as Teaching Assistant for Business Economics Department and Marketing Department; GMAT: 740 (97th percentile)
- *Leadership:* VP Careers, Investment Management Club; Cluster President, Wharton Graduate Association (elected by 220 students); selected to lead PE/VC Club's career trek to India
- *Activities:* Analyst, Wharton Investment Management Fund (\$2M student-run equity fund); member of Tennis Club

INDIAN INSTITUTE OF TECHNOLOGY DELHI **Delhi, India**
Bachelor of Technology, Major in Mechanical Engineering **2009-2013**

- *Academic Honors:* Awarded Director Merit Scholarship (Top 7% in a class of 800 students); awarded Scholarship for securing National Rank 264 among 1M students in national engineering exam (99.97th percentile)
- *Activities:* Board Member, English Debating & Literary Club (EDLC); received award for "significant contribution" to EDLC (conferred on three students annually); won several inter-and-intra college parliamentary debates
- *Internship:* ITC Limited, achieved 66% changeover time and 3% wastage reduction in ITC's factory via process optimization

EXPERIENCE

CITADEL LLC (*\$30Bn+ global multi-strategy hedge fund*) **New York, NY**
Summer Associate, Surveyor Capital – Long/Short Equity **2018**

- Initiated coverage on wood products (WFT CN, WY, RYN) and auto component (APTV, LEA, MGA) companies within seven-person Industrials team with \$3bn equity long/short portfolio
- Performed fundamental analysis including financial models, analysis of proprietary data and expert interviews
- Developed investment recommendations and pitched ideas to PM; two short ideas added to the portfolio

THE BLACKSTONE GROUP **Mumbai, India**
Investment Analyst, Private Equity **2015-2017**

One of 15 professionals responsible for South Asian investments of Blackstone's \$18B global private equity fund

- Developed investment strategies as lead analyst on Financial Services and Industrials sectors
- Evaluated over 40 deals ranging from \$50M to \$1.3B: built detailed financials models, conducted due diligence, prepared IC memos, participated in negotiations, supervised portfolio value-creation projects and exit processes

Select transaction experience and portfolio companies managed:

- \$1.3B potential acquisition of a cement company: Partnered with CPPIB for an LP co-investment; built financial model used to price deal; managed lender financing (deal structuring, covenant negotiation)
- \$450M potential acquisition of a leading specialty finance company (consumer lending): Executed accounting and forensic diligence of loan book (static vintage loan delinquencies, stressed loan analysis) and performed financial modelling
- CMS Info-systems, \$60M investment in India's largest cash management services provider: Worked with legal teams to structure Blackstone's exit to Baring Private Equity Asia for a \$300M deal; negotiated management team incentive structure
- MCX, \$40M investment in listed commodity exchange: Consulted with management team and sell-side analysts to conceptualize a catalyst driven exit approach that led to a 5x increase in multiple on invested capital from stock's low
- FINO, \$35M investment in financial inclusion solutions company: Guided management team on strategy for launch of India's first Payments Bank ("PB"); worked with CFO to lead mandate to raise \$60M to fund PB business plan

PARTHENON-EY (Formerly the Parthenon Group) **Mumbai, India**
Associate Consultant **2014-2015**

Built expertise in emerging markets education strategy through 10+ assignments in Latin America, Middle-East, and SE Asia

- Performed due diligence on an international K-12 asset in Singapore, analyzing competitive landscape via student surveys and preparing five-year student intake and capex forecasts
- Prepared strategy to launch online curriculum for a large school chain, surveying 2K students to analyze consumer behavior
- Conducted proprietary primary research to estimate Brazil's test prep market size and identified acquisition targets for a large publisher in Brazil looking to enter the test prep market

ADDITIONAL INFORMATION

- **Volunteer, Clinton Foundation:** built strategy for \$12M Nutrition Initiative in India reaching 13M beneficiaries **2013-2014**
- **Interests:** Investing (manage personal account); Open Water Scuba Diving, A-Capella Singing, Hiking, Half Marathons

JENNY GUYTON

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA Philadelphia, PA
Master of Business Administration Candidate; Major in Health Care Management 2017-2019

- Recipient of Howard E. Mitchell Scholarship, highest merit-based award for admitted MBAs; covers full tuition and stipends
- Board member, Wharton Health Care Management Alumni Association; VP of Social, Wharton Women in Business Club
- GMAT: 750 (98%)

YALE UNIVERSITY New Haven, CT
Bachelor of Arts; Major in Ethics, Politics, and Economics 2008-2012

- President, Pi Beta Phi; President, residential college council; Master's Cup graduation award for outstanding service

EXPERIENCE

BRIDGEWATER ASSOCIATES Westport, CT
Senior Management Associate Intern Summer 2018

- Worked independently and in teams on two internal consulting projects for largest hedge fund in the world with approximately \$150 billion in assets under management
- Analyzed the processes by which an internal consulting team manages its capacity and recommended changes to team's organizational design, expected to improve visibility into future demand and mitigate periods of demand exceeding supply

OXEON PARTNERS New York, NY
Venture Capital Intern Summer 2018

- Assisted in all aspects of the venture capital process, including fundraising and fund strategy for new Town Hall Ventures fund; developed materials for Limited Partner diligence requests and financial models to inform portfolio construction
- Led diligence on health care services company; created and presented investment memorandum to investment committee
- Developed investment thesis in women's health market; sourced and prioritized potential investments

FLARE CAPITAL PARTNERS Boston, MA
Flare Capital Scholar 2017-2018

- Selected by General Partners as member of Flare Capital Scholars program, which seeks to build a community of emerging health care leaders and provide them with mentorship and training in venture capital
- Advised health care analytics portfolio company on its partnership strategy; presented recommendations to founders and CEO

THE ADVISORY BOARD COMPANY Washington, DC
Chief of Staff, Technology 2016-2017

Associate Principal, Manager, Senior Analyst; Corporate Strategy and New Product Development 2014-2016

- Promoted three times with half the usual time in seat per position

Select project experience:

Led strategic growth initiatives

- Analyzed growth opportunity in electronic medical record optimization consulting, prioritized potential acquisition targets, and managed diligence process, resulting in acquisition of Clinovations and additional revenue of \$35 million in first year
- Managed cross-functional team of over 50 members to develop and launch health care analytics tool, sold first two installations to Chief Information Officer clients, and trained sales team, generating \$10 million of revenue in first year
- Built business case for creating new partnerships team; successfully advocated Chief Strategy Officer to invest; built team and sourced, evaluated, negotiated, and managed relationships with enterprise technology, medical device, and analytics partners

Managed turnaround for health care technology business unit

- Developed strategic recommendation, for Chief Officers and Board of Trustees, to improve operations, resulting in 9% margin improvement through targeted office closures, reduction in force activities, and product shut downs

RAYMOND JAMES & ASSOCIATES Memphis, TN
Analyst, Investment Banking 2012-2013

- Recognized as top tier (top 5%) analyst among class of 35 peers in annual review

Select transaction experience (of three closed and 30 potential deals):

- Advised SimpliSafe, direct to consumer home security company, on capital raise process, resulting in investment by Sequoia Capital; assisted with business development, served as contact to potential buyers, and advised management in sales meetings

GOOGLE New York, NY
BOLD (Building Opportunities for Leadership and Development) Intern, Google Drive Summer 2011

- Led user segmentation analysis to prioritize features of Google Drive in advance of its launch; presented to product leadership

ADDITIONAL INFORMATION

- Interests: water sports (skiing, scuba diving, sailing), card games; volunteering: Arthritis Foundation, mentoring junior women

MIHIR JAIN

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Finance

2017 – 2019

- Director of Research and Fund Fellow, Wharton Investment Management Fund (\$2 million student-run equity fund)
 - Selected as 1 of 12 MBAs among 60+ applicants to manage an equity portfolio for the Wharton endowment
- VP of Social and Member, Wharton Investment Management Club
 - 2nd place (out of 20+ participants) at 2018 Wharton Investment Management Club Reunion Stock Pitch Competition
 - 1st place (out of 11 teams) at 2017 Columbia CSIMA Stock Pitch Challenge
 - 2nd place (out of 14 teams) at 2017 Wharton Investment Management Stock Pitch Competition
- Choreographer of Dance Studio; GUIDE undergraduate mentor; member of India Club

STERN SCHOOL OF BUSINESS, NEW YORK UNIVERSITY

New York, NY

Bachelor of Science; Majors in Finance and International Business

2008 – 2012

- GPA: 3.70; Honors: Cum Laude, Founders' Day Scholar, Dean's List (2008-2012); Scholarship (25% tuition, merit-based)
- Captain of NYU Pandemonium (Hip Hop Fusion Dance Troupe); Director of Stern Sports Business Club; Resident Assistant

EXPERIENCE

CITADEL LLC, *Global Multi-Strategy Hedge Fund (\$25 Billion AUM)*

New York, NY

Summer Associate, Surveyor Capital

2018

- Initiated coverage on restaurant sector and performed value added research by conducting surveys, field visits, expert calls, and analyzing proprietary data; constructed and proposed market-neutral, long/short portfolio of 4 investment ideas
- Built proprietary industry model and risk/reward comparables sheet to identify potential investment opportunities
- 2nd place (out of 9 interns) at 2018 Surveyor Summer Associate Stock Pitch Competition; pitched long on The Stars Group

RED OAK PARTNERS, *Value-Oriented Long/Short Equity Hedge Fund (\$125 Million AUM)*

New York, NY

Investment Analyst, Generalist

2016 – 2017

- Performed bottom-up, fundamental research on public companies across multiple industries to identify potential investment opportunities with asymmetric risk/reward framework; presented investment recommendations to PM on a weekly basis

Selected Transaction Experience

Project Score: leading luxury retailer of women's apparel and accessories; \$10 million equity investment

- Sourced and pitched long idea as "buy low" pick after assessing market concerns were masking international opportunity
- Conducted channel checks with 100+ department stores, spoke to former private equity owner, developed relationship with company CEO and CFO, quantified key value drivers, and crafted investment thesis
- Long idea was added to portfolio and ultimately sized as top position in book; investment generated ~40% returns

GOLDPOINT PARTNERS, *Private Equity Firm (\$12 Billion AUM)*

New York, NY

Private Equity Associate, Generalist

2013 – 2016

- Ranked as top Associate in both 1st and 2nd year; only Associate in class of 5 to receive 3rd year offer
- Evaluated private, mid-market investment opportunities, built financial models to assess returns under various scenarios, led due diligence processes, and drafted investment memoranda for equity and mezzanine transactions

Selected Transaction Experience

QMax: provider of drilling fluids and solids control services to NOCs/IOCs; \$75 million equity investment (\$305 million TEV)

- Built detailed LBO model by geography to analyze returns under multiple operating, financing, and regulatory scenarios
- Worked with CFO to identify potential add-ons, hire new management team members, and update internal financial reporting

Aegis: toxicology lab focusing on pain management compliance testing; \$90 million equity investment (\$475 million TEV)

- Created investment thesis, determined appropriate valuation, and constructed LBO model to analyze returns based on healthcare reimbursement environment; led calls with expert networks to identify industry trends and unsystematic risks

MOELIS & COMPANY

New York, NY

Investment Banking Analyst, Generalist

2012 – 2013

- Built integrated financial models to perform LBO, DCF, SOTP, precedent transaction, and comparable company analyses

Selected Transaction Experience

Government of Missoula, Montana: advised government on acquiring privately-owned water utility

- Worked closely with both financial sponsor and municipality to build detailed operating model; performed discounted cash flow analysis and projected allowed return on rate base under different regulatory scenarios

ADDITIONAL INFORMATION

- **Interests:** Basketball, personal investing, hip hop dancing, Wikipedia, fantasy football, weightlifting, Jaipur charity work
- **Languages:** Fluent in Hindi

PATRICK KENNEDY

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Masters of Business Administration Candidate; Major in Health Care Management

2017-2019

- PE/VC Club, Investment Management Club, Health Care Club, GUIDE Mentoring Program, IM Hockey
- Fund Fellow, Wharton Investment Fund: selected to manage \$2M student-run equity fund for Wharton's endowment employing a fundamental, value-oriented investment strategy; elected Director of Performance
- 2nd Place, 2017 University of Michigan Ross Stock Pitch Competition
- GMAT 770 (99th percentile), First Year Honors Awardee (top 20% class), Spring Director's List Awardee (top 10% class)

DARTMOUTH COLLEGE

Hanover, NH

Thayer School of Engineering; Bachelor of Engineering in Engineering Sciences (GPA 3.8)

2007-2011

Dartmouth College; Bachelor of Arts in Engineering Sciences (High Honors/Cum Laude/GPA 3.7)

2007-2011

- Tau Beta Pi Engineering Honor Society; MCAT 37 (98th Percentile); ACT 35 (99th Percentile)
- Special Olympics Ski Coach and Regional Winter Games Organizer; A-Capella choir President; Engineering Honors Thesis.

EXPERIENCE

CITADEL – SURVEYOR CAPITAL, \$1.5b Healthcare Portfolio Team

New York, NY

Summer Associate, Healthcare – Long/Short Equity

Summer 2018

- Identified, analyzed and performed due diligence on public equity investments as part of 8-person team.
- Initiated coverage on eight mid-cap companies (med device, spec pharm, and lab/diagnostics); one position added to book.
- First-Place Winner, Surveyor Summer Associate Stock Pitch Competition.

NEXT47 (SIEMENS VENTURE CAPITAL) (corporate venture capital arm of Siemens, ~\$200m AUM)

Boston, MA

Associate, Healthcare and Industrial Technology Groups

2015-2017

Board Observer, Seventh Sense Biosystems (next47 Portfolio Company)

2017

- Led internal diligence process, including market, technology and team evaluation; three-sheet financial modeling; and waterfall returns analysis for new investments; presented two deals to investment committee.
- Formulated investment thesis and target list for nascent healthcare and industrial technology markets, including: AI; population health; next-generation sequencing; and precision medicine. Work supported next47's seed investment in Riffyn.
- Co-organized healthcare analytics investor event with 80 companies and 30 investors in attendance.
- As Board Observer, facilitated strategic relationship discussions between Siemens and Seventh Sense Biosystems.
- Mentored two new Associate hires and led financial modeling & returns analysis training.

Selected Transactions:

- STAT-Diagnostica (\$20m Series C Investment) – Near-patient molecular diagnostic platform
- Veo Robotics (Seed Investment) – Machine vision and control system for collaborative robotics; incubated at next47
- Atom Power (Seed Investment) – Network-enabled solid-state circuit breaker platform

HEALTH ADVANCES (Healthcare consultancy for pharma, med device, diagnostic, and financial clients)

Boston, MA

Associate (Full Engagement Manager)

2015

Consultant (Post-MBA Introductory Engagement Manager)

2014

- Led teams of 2-4 consultants and served as primary contact for CEOs; VPs of BD, R&D, or Strategy; and PE Investors.
- Chaired firm's Forecasting and Business Analytics Practice (2014-2015), led analytics projects and invited to present firm's analytical capabilities in new project sales calls, including a pitch that helped close six-month project with a large biotech.
- Evaluated potential for future HIV therapeutics with key stakeholders, created worldwide revenue model, and presented findings and portfolio financial potential to President of top 5 generic pharma; recommended products launched in 2018.
- Developed new-hire financial modeling and analytics training program; trained three cohorts of Analysts and Consultants.

Senior Analyst (2013), Analyst (2011-2012)

2011-2013

- Identified novel combination therapies with opportunity for generic pricing arbitrage and forecasted market opportunity with patient-flow revenue model for public generic company. Presented to company's clinical advisory board in India.
- Created an economic tool to highlight the cost impact of a novel cell-free diagnostic technology; published at ASCO 2013.

ADDITIONAL INFORMATION

- **Community:** Startup Leadership Program Boston – Co-led entrepreneur training program for 25 entrepreneurs (2015-2016); Minds Matter - Mentored high school student (2012-2014); mentee won \$20k tuition award for mentee/mentor excellence.
- **Additional Experience:** Training the Street; C++, C, Java, VBA, MATLAB, Python, and Stata programming languages
- **Interests:** Investing, Rock Climbing, Hiking (39 of 48 NH's 4,000 footers), 2014 Chicago Marathon, Cycling, Eagle Scout

ERIC J. LEE

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Finance and Business Analytics

2017-2019

- Fund Fellow. 1 of 12 students selected to manage \$2M equity portfolio on behalf of Wharton endowment.
- Finalist, Boston Investment Conference. 1 of 4 MBA students (over +100 applicants) selected to pitch to panel of judges from Baupost, Fidelity, Putnam Investments, and Whale Rock Capital.
- 1st Place, Wharton Investment Management Stock Pitch Competition. 2nd Place, Cornell Stock Pitch Competition.
- Viking Global Stock Pitch Critique. 1 of 5 students (60 applicants) selected to present stock pitch to investment team.
- Selected to participate in the *Semester in San Francisco* program (fall 2018) focused on technology and entrepreneurship.

VITERBI SCHOOL OF ENGINEERING, UNIVERSITY OF SOUTHERN CALIFORNIA

Los Angeles, CA

Bachelor of Science in Industrial and Systems Engineering, Minor in Jazz Studies

2007-2011

- GPA: 3.8 / 4.0, *Magna Cum Laude*.
- Tau Beta Pi (engineering equivalent of Phi Beta Kappa). 2-time recipient of Achievement Rewards for College Scientists for published research on the life cycle analysis of electrifying cargo tractors in the Port of Los Angeles (\$10K scholarship). 2-time Provost Research Fellow (\$3K research stipend). Renaissance Scholar. W.V.T. Engineering Honors. Dean's List.

EXPERIENCE

WHALE ROCK CAPITAL MANAGEMENT, LLC. (*\$3.5B Long/Short Equity Hedge Fund*)

Boston, MA

Summer Analyst, Technology

Summer 2018

- Deep dive into Hyperconverged Infrastructure, Software Defined Networking, and Software Defined Storage.
- Recommendations led to 600bps change in capital (2 new positions and an existing name increased to a top 10 holding).

PARTNER FUND MANAGEMENT, L.P. (*\$5B Long/Short Equity Hedge Fund*)

San Francisco, CA

Analyst, Technology (Internet, Software, Hardware)

2015-2017

- Member of four-person global technology team. Primary coverage of 15% of exposure within sector team (~20 companies). Responsibilities included monitoring thesis signposts in earnings results and news flow and providing idea recommendations.

Select Investment Experience

- Recommended long position in online travel agency despite investor skepticism of slowing hotel room night growth, macro fears of tapered travel due to geopolitics, and increased competition. Viewed company as consistent compounder.
- Initiated short positions in security software due to FCF burn, legacy technologies, or single product growth walls. Generated absolute short alpha, along with balancing net long exposure held at the broader portfolio level.

THE CAPITAL GROUP COMPANIES, INC. (*\$1.4T Long-Only Equity Fund*)

Los Angeles, CA

Associate (Capital World Investors), Technology, Media & Telecom

2013-2015

- Ranked at top of global Associate class, lead Associate for Technology coverage group, and candidate for direct promotion to Investment Analyst. Performed detailed financial analyses and due diligence on domestic and global public equities.

Select Investment Experience

- Persuaded Portfolio Managers to avoid security software sector after conducting 3-month intensive review of historical macro conditions to discern market and product cycle insights for 12 pure-play companies. Launched initiation report and became Capital's in-house industry expert. Determined most companies in sector would not generate multi-year returns.
- Spearheaded diligence on outdoor media company (spin-off), leading to \$330M investment. Convinced Portfolio Managers the stock was well-suited for yield funds. Analyzed issues including REIT index inclusion, state-by-state billboard regulations, ad buying trends, and geographic vendor exposure.

GOLDMAN, SACHS & CO.

San Francisco, CA

Analyst, Investment Banking Division – Generalist

2011-2013

- Ranked in top-tier of global Analyst class. Selected to train 1st year Analysts.
- \$1.1B LBO to Energy Capital Partners as sole sell-side advisor for EnergySolutions, \$750M Senior Notes for Ball Corporation, \$100M Equity Private Placement (Series D Financing) for Cool Planet.

ADDITIONAL INFORMATION

- **Interests:** Music composition (bass, piano, trumpet, guitar, drums), surfboard design, travel to over 25 countries, fixing my golf swing, Wharton undergrad mentor, Value Investors Club (VIC) member, completion of CFA Level II.
- **Additional Internship:** Artisan Partners Thematic Team (spring 2018). Long/short technology-focused equity investing.

JOHN PAUL LEE

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Accounting, Certificate in Law (Penn Law)

2017-2019

- **GMAT:** 770 (99th percentile)
- **Activity:** Credit/Distressed Investing (Co-President, placed 1st in American Bankruptcy Institute MBA Complex Restructuring Competition); Investment Management (Research Analyst for Wharton Investment Management Fund, VP Social); Private Equity; Guide Mentor Program; and Rugby clubs

CORNELL UNIVERSITY

Ithaca, NY

Bachelor of Arts; Major in Economics

2007-2010

- **SAT:** 790/770 Math/Reading, SAT Math IIC: 800 (99th percentile)
- **Activity:** Rugby, Lambda Phi Epsilon Fraternity (Executive Board Member)

EXPERIENCE

DAVIDSON KEMPNER CAPITAL MANAGEMENT (*\$31B AUM Hedge Fund*)

New York, NY

Summer Associate, Distressed Investments

Summer 2018

- Led evaluation and execution of private equity, special situations, distressed credit, and public equity investments

Select Transaction Experience

- Acquisition of \$150M portfolio of distribution centers from the Toys R Us bankruptcy estate (Cover Bid)
- Acquisition of \$240M portfolio of conference center hotels (In Process)
- Evaluation of distressed public securities (In Process)

OAKTREE CAPITAL MANAGEMENT (*\$70B AUM Private Equity / Alternatives Manager*)

Los Angeles, CA

Associate, Real Estate Opportunities Fund & Real Estate Debt Fund

2012-2017

- Served as sole Associate investing the inaugural \$1.5B (including separate accounts) Real Estate Debt Fund ("Fund I"): actively engaged in all aspects of fund's growth since inception including fund structuring, fundraising, and execution of investment mandate
- Deployed \$1.4B+ of capital in Fund I (~90% of total investments) and opportunistic REPE fund across 40+ closed transactions, after synthesizing investment theses and running analysis, execution, negotiation, and procurement of investment committee approvals for investments in high-yield and convertible bonds, bridge and mezzanine financings, preferred equity, JV equity, non-performing loan pools, and commercial mortgage-backed securities ("CMBS")
- Managed relationships with partners and outside advisors (legal counsel, underwriters, and consultants), oversaw fund leverage and hedging, and assisted in recruiting and mentoring 2 Analysts and 7 Associates
- Led creation of fund analytics suite to determine management and incentive fee structure for upcoming Fund II (\$2.5B target) and to project returns to investors and profit to Oaktree corporate for Fund I; directly supervised Analyst

Select Transaction Experience

- Acquisition of \$100M of real estate related high-yield and convertible bonds and \$250M of CMBS
- Negotiation and formation of JV to originate \$350M fixed-rate mortgages and issue bonds collateralized by such mortgages
- Acquisition of \$265M non-performing and \$11M re-performing residential loan pools
- Acquisition of \$73M mezzanine financing and subordinate CMBS collateralized by national hotel portfolio

Analyst, Public-Private Investment Fund & Real Estate Opportunities Fund

2012-2013

- Served as sole Analyst investing and exiting the Public-Private Investment Fund ("PPIF"), a \$2.3B portfolio of distressed CMBS, in partnership with the U.S. Treasury Department: generated 26.3% net internal rate of return since inception, the highest return among all 8 fund managers participating in the PPIF program
- Deployed over \$1B of capital in CMBS by identifying mispriced risk, communicating investment recommendations internally, and sourcing product from and executing trades through broker-dealer relationships
- Managed team of 10 senior underwriting consultants and oversaw underwriting of \$50B+ of securitized real estate assets
- Upon successful exit of the PPIF program, only Analyst to be promoted to Associate in group's history

MARATHON ASSET MANAGEMENT (*\$14B AUM Hedge Fund*)

New York, NY

Structured Credit Investment Analyst

2011

- Invested in residential mortgage backed securities ("RMBS") and collateralized debt obligations ("CDO") by analyzing large datasets in SQL and VBA to generate investment ideas

ADDITIONAL INFORMATION

- **Interests:** Personal investing, fitness, rugby, snowboarding, novice golfing, semi-competitive eating, taco trucks

YIDA LI

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Majors in Finance and Business Analytics

2017-2019

- Fund Fellow at Wharton Investment Management Fund (selected as 1 of 12 students to manage \$2mm equity fund)
- Board Member of Wharton Investment Management Club; Wharton Hong Kong Investment Management Trek Leader
- Co-President at Greater China Club; Mentor for Undergraduate Students in GUIDE program | GMAT: 730 (96th Percentile)

UNIVERSITY OF CALIFORNIA, BERKELEY

Berkeley, CA

Bachelor of Arts in Economics (Honors) and Operations Research & Management Science

2008-2012

- Dean's Scholarship (Merit-based, 2012), Omicron Delta Epsilon Honor Society (Awarded to top 5% Economics Students)
- GPA: 3.62 / 4.00 | Honor Thesis: "A Study of Emerging Market Giants that Gained Cross-Border M&A Success"

EXPERIENCE

YORK CAPITAL MANAGEMENT (\$19bn AUM Global Hedge Fund)

Hong Kong, China

Summer Investment Analyst - Generalist

Summer 2018

- Built multi-scenario financial models and conducted primary research to analyze 50+ long / short and event-driven investment opportunities; initiated 6 Long / 2 Short positions that contributed to positive firmwide PnL during the summer
- Presented new ideas to global CIO and Asia CEO with detailed valuation analyses, sizing and entry / exit recommendations
- Led 1x1 management and analysts meetings; attended conferences and roadshows as sole representative from York Capital

CALIXTO GLOBAL INVESTORS (\$500mn global TMT L/S Hedge Fund led by ex-DoR at JAT Capital)

Miami, FL

Summer Investment Analyst (Rated as one of the top performers among all intern classes)

Summer 2018

- Evaluated 30+ investment opportunities in the China TMT space, including analysis of proprietary data and primary checks
- Conducted deep dive research on China live streaming / logistics sectors and presented 2 L/S investment ideas to the PM

ADVENT INTERNATIONAL (\$39bn AUM Global Private Equity Fund)

Shanghai, China

Investment Associate

2015-2017

- Spearheaded deal execution by leading 5+ financial and commercial due diligence processes, managing various workstreams with external advisors / financing banks, and building complex LBO and operating models
 - Directed 5+ global portfolio company projects with China expansion themes as sole representative from Greater China office
- Selected Investment and Portfolio Management Experience:
- **King Koil China – \$175M+ Majority Stake Buyout of China's Leading Premium Mattress Brand (Closed in Oct 2016)**
 - Constructed dynamic financial models with deal structure flexibility and in-depth build-up across 4 major business segments
 - **The Learning Lab ("TLL") – Portfolio Management of Singapore's #1 Premium After-School Tuition Player**
 - Evaluated a potential \$150M add-on acquisition of Vietnam's premium English language tuition provider; built standalone and pro-forma LBO models, analyzed synergies for value creation plan, and quantified deal accretion to TLL
 - Identified and sourced 3 China targets for TLL's international expansion projects and analyzed potential synergy areas

GOLDMAN, SACHS & CO.

Beijing, China / San Francisco, CA

Investment Banking Associate / Analyst

2012-2015

- Ranked #1 among Class of 2012 Analysts at Beijing / San Francisco in terms of number of closed deals (34 transactions worth of US\$29bn with deal types of M&A, restructuring, and capital markets) across 5+ sectors in China & USA
 - Led 10+ strategic, financing, and capital structure discussions externally and contributed key inputs to senior GS team
 - Mentored 20+ junior VPs / Associates / Analysts in classic banking on derivatives and convertible product knowledge
- Selected Transaction Experience:
- **Developed SOTP valuation analysis for Qingdao Haier's \$787mm Acquisition of Overseas Asset from Haier Group**
 - **Analyzed key input of convertible pricing for Tesla's \$1.02bn Convertible & Equity Dual Tranche Offering**

ADDITIONAL INFORMATION

- **Interests:** Investing, biking, cooking, comedy TV shows, hiking, karaoke, soccer, and traveling (25+ Countries)
- **Investments:** Personal investing in US, Hong Kong and Chinese A-shares stock markets
- **Languages:** Native speaker of Mandarin; Intermediate proficiency of Cantonese
- **Computer:** High proficiency in Bloomberg, Capital IQ, Adobe, and programming languages (UNIX, SQL and MATLAB)

LAWRENCE K. PAUSTIAN, CFA

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate, Double Major in Finance and Accounting

2017 – Present

- Active member of Wharton Investment Management, Private Equity, Finance, Public Speaking, and Veterans clubs
- GMAT: 770 (99th percentile); First Year Honors (Top 20% of Class of 2019)

UNITED STATES MILITARY ACADEMY

West Point, NY

Bachelor of Science in Economics, Minor in Civil Engineering

2004 – 2008

- Dean's List (all semesters); winner of 2007 West Point Bridge Design Contest
- NCAA Division I Track and Field Sprinter (100m, 200m); Co-Chair in Black and Gold Leadership Forum; member of USMA's Federal Reserve Challenge Team; principal nominee of Senator John McCain for admission to West Point

EXPERIENCE

INTERN TO WILLIAM N. THORNDIKE, investor and author of best-selling business book *The Outsiders*

Boston, MA

- Worked with Mr. Thorndike on equities research project, analyzing companies and their management **Summer 2018 – Present**
- Internship extended through school year to perform deep dive on select company with long runway for growth

HAWKEYE CAPITAL MANAGEMENT, LLC, a value hedge fund focused on distressed credit and equity

New York, NY

Summer Investment Analyst

Summer 2018

- Pitched long idea in major American restaurant franchise company after identifying cause of considerable selling pressure to be transitory; implemented and analyzed wide-reaching consumer survey, which strengthened conviction in thesis
- Built financial models, conducted channel checks, attended industry conferences, and held discussions with management teams

CROWN VENTURE MANAGEMENT, LLC, a long/short value equity hedge fund

Palm Beach, FL

Co-Founder and Managing Partner

2013 – 2017

- Managed Fund full-time following transition from U.S. Army in November 2013; founded Fund in 2008
- Generated ideas and conducted in-depth security analysis for a low-turnover, concentrated portfolio of 8 to 12 core holdings
- Largest holding in Fund included Friedman Industries (2009), Skechers (2012), Amazon.com (2014), Axon Enterprise (2017)
- Built and updated detailed valuation models, including enterprise DCF, cash-flow-to-equity, and sum-of-the-parts
- Wrote semiannual letters discussing specific investments and investment strategy to 14 limited partners

NATO, NATO Training Mission-Afghanistan

Kabul, Afghanistan

Aide-de-Camp to Commanding General (Rank: Captain)

2012 – 2013

- Advised General as his most trusted agent; helped shape strategic-level decisions for Afghan National Security Forces
- Cultivated relationships with ambassadors, Afghan leaders, and coalition generals
- Ranked #1 of 42 company-grade officers; awarded Bronze Star Medal for superior performance in combat zone

UNITED STATES ARMY, 391st Combat Sustainment Support Battalion

Bamberg, Germany

Human Resources Manager (Rank: First Lieutenant)

2011 – 2012

- Supervised 18-person team responsible for all HR functions within forward deployed unit of 1500 soldiers
- Formally recognized by Commanding General as having best HR program within 21st Theater Sustainment Command
- Promoted to Captain; ranked #1 of 9 company-grade officers within Battalion headquarters

UNITED STATES ARMY, 14th Transportation Battalion

Vicenza, Italy / Balad, Iraq

Human Resources Manager (Rank: Second Lieutenant)

2008 – 2011

- Led 8-person team in successful 12-month HR mission in Iraq during Operation Iraqi Freedom and Operation New Dawn
- Wrote and published widely-distributed manual that established procedures for handling soldiers who are killed, wounded, or missing in action, resulting in prompter notification to the next of kin
- Promoted to 1st Lieutenant; selected by senior leadership to become HR Manager of largest battalion in the U.S. Army

ADDITIONAL INFORMATION

- **Awards:** Toastmasters District International Speech Contest Champion (one of the top one hundred competitive public speakers in the world in 2017); Ironman Boulder 2017 Finisher (140.6-mile triathlon)
- **Certifications:** Chartered Financial Analyst (CFA) charterholder as of 2014; graduate of U.S. Army Air Assault School
- **Technical skills:** Capital IQ, Bloomberg, Mergermarket, Thomson One, Microsoft Office, Excel VBA, Java
- **Community:** President of The Palm Beach Toastmasters Club; West Point Society Board Member and Secretary

HONGYING SONG

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Business Analysis and Finance

2017-2019

- Active member of Wharton's Investment Management Club, Analytics Club
- Equity Research Analyst for Wharton Investment Management Fund (\$2M student-managed fund)
- GMAT 750 (98%)

GUANGHUA SCHOOL OF MANAGEMENT, PEKING UNIVERSITY

Beijing, China

Bachelor of Arts in Finance

2009-2013

- Excellent Students Award (2009 & 2010); VP in Student Union of Guanghua School of Management
- National College Entrance Exam: Ranked No. 10 out of 100,000+ in Heilongjiang Province of China
- Exchange Student, Copenhagen Business School, Denmark (2012)

EXPERIENCE

TOURBILLON CAPITAL PARTNERS

New York

Investment Analyst Intern

Summer 2018

- Identified and analyzed public equity investments across internet, technology and consumer sectors
- Initiated coverage and developed a long thesis for a chain restaurant IPO deal. PM added investment to the fund
- Located local resources to identify the credibility of a portfolio company when it was under attack by a short seller. Worked with PM to buy the dips and yielded a 25% return in two days
- Created firm-wide investment strategy based on international consumer brands' performance in China by initiating an industry scan; developed tracking database and methods. Positioned as action plan by PM

SUMMITVIEW CAPITAL MANAGEMENT (\$500M AUM long/short equity fund)

Beijing, China

Investment Analyst

2015-2017

- Primary analyst for portfolio worth ~\$50M (~15 companies). Industry coverage focused on internet and technology
- Initiated and monitored potential investment opportunities based on long-term theses, quarterly results and catalyst driven events. Regularly improved research methodology, predicted potential risks and used outputs to influence portfolio manager

Investment Highlights:

- Initiated coverage of online game company by consulting with competitors to address the R&D ability and by sourcing 3rd-party data providers to monitor performance. Issued buy recommendation, generating return of 80% in six months
- Spearheaded monetization potential of online live broadcasting company (MOMO) by market sizing, user interviews and competitor benchmark analysis, identified a 200% revenue upside
- Predicted slowing growth of a classified advertisement website (WUBA) by combining market analysis and big data analysis to discover forward-looking factors, generating a return of 25% in one month through short sell
- Persuaded fund manager to shift from long position into short position on an online real estate agency (SFUN), by studying the website's management and strategy and by analyzing its efficiency and cost structure, yielding 50% return

BDA CONSULTING

Beijing, China

Senior Analyst

2014-2015

Analyst

2013-2014

- Conducted business due-diligence and fundamental research on public and private companies for top global hedge funds, PE funds and VC funds, including Tiger Global, Warburg Pincus, GIC, advising in investment decisions
- Received top performance marks, promoted from analyst to senior analyst in the shortest period as compared to peers

Projects:

- Evaluated private education website with \$100M valuation, leveraging market analysis, customer surveys and product tests to support case for \$20M investment. Developed product test methodology that became guideline for future projects
- Developed investment recommendation for \$30M investment in a Chinese e-Commerce site (VIPS) and monitored its performance by collecting and analyzing data from website, generating ~700% return in 1.5 years
- Proposed and led industry scan of shopping behavior of Chinese outbound tourists and impact on the revenue of consumer goods, bringing six more projects to the firm and leading to series of successful investments

ADDITIONAL INFORMATION

- **Community Involvement:** Volunteer Society Nepal: taught Chinese and English to elementary schoolers; organized culture nights for volunteers and children; led volunteer recruitment activities by organizing experience-sharing events
- **Interests:** Advanced Open Water Scuba Diving (100+ dives); traveling to 30+ countries, horseback riding, playing piano and investing
- **Skills:** SPSS, Bloomberg terminal, SQL, Python
- **Languages:** Native Chinese
- **Investment:** Personal investment achieved 130%+ return in 2017

EDMUND VINCENT G. SORIANO

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Master of Business Administration Candidate

Philadelphia, PA
December 2018

- Two-time Director's List awardee (top 10% of class); First-Year Honors awardee (top 20%)
- Member of Wharton Investment Management Fund, Private Equity and Venture Capital Club, Technology Club, Ski Club
- GMAT: 780 (99th percentile)

HARVARD UNIVERSITY

Bachelor of Arts, Applied Mathematics, High Honors in Field

Cambridge, MA
2011

- Major GPA: 3.8, Cumulative GPA: 3.7
- President, Harvard Philippine Forum – re-designed board, tripled club membership, doubled member and campus engagement
- CFO, Harvard National Model U.N. – supervised \$200,000 budget, 180 staff for four-day, 3,000-delegate conference
- Earned 3.9 GPA in PhD-level coursework – market design, auction theory, psychology and economics, normative economics

EXPERIENCE

CITADEL LLC (*\$25bn global multi-strategy hedge fund*)

New York, NY
2017

Summer Associate, Surveyor Capital – TMT / Consumer

- Analyzed investments in consumer-oriented tech stocks based on fundamental research, data analytics, and management input
- Developed lodging industry framework detailing economic dynamics between hotel C-corps, REITs, and online travel agencies

TIGER GLOBAL MANAGEMENT (*\$20bn+ alternative asset manager*)

New York, NY
2017

Consultant

- Performed proprietary research supporting thematic and investment due diligence across internet, consumer, and logistics sectors

GIC PRIVATE EQUITY (*Part of Singaporean sovereign fund with an estimated \$400bn+ AUM*)

New York, NY

Assistant Vice President, Direct Investments Group – direct promote to post-MBA role

2015 – 2016

Associate, Direct Investments Group – technology sector focus

2013 – 2015

- Evaluated and closed five leveraged buyout / recapitalization investments with equity commitments of \$150-600mm each
- Led diligence on a total of 12 investments including LBO, growth equity and credit opportunities to invest over \$2.1bn of capital

Selected Transaction Experience

\$7.7bn buyout of Multiplan, the largest provider of out-of-network cost containment solutions for U.S. healthcare payers (closed)

- Led diligence process alongside Senior VP, managed contributions of two Associates, liaised with management, advisors
- Developed financial projections by product and by customer, based on historical claims data, product efficacy, contract rates
- Performed diligence with focus on healthcare spending trends, product economics, key customer relationships, sales pipeline

\$750mm equity recapitalization of Kronos, a leading provider of workforce management software with \$4.5bn TEV (closed)

- Projected financial performance across operating scenarios; analyzed impact of SaaS transformation on growth and profits
- Completed business due diligence with focus on white space analysis, SaaS evolution, market growth, competitive position

\$752mm buyout of Turnitin, the largest global provider of anti-plagiarism software (closed)

- Built detailed tops-down subscription-based operating model driven by market penetration rates and ARPU growth
- Conducted business due diligence with focus on product adoption rates, competition, customer willingness-to-pay

MORGAN STANLEY

New York, NY

Investment Banking Analyst

2011 – 2013

Investment Banking Summer Analyst

2010

- Advised 30+ clients on M&A, strategic alternatives analyses, transaction financing, and capital markets advisory assignments
- Closed four transactions including company sale, asset divestiture, asset acquisition, and IPO within the industrials sector
- Modeled operating, financing, M&A, and LBO scenarios to evaluate pro forma financials, capitalization, and credit statistics

HARVARD / M.I.T. COOPERATIVE SOCIETY

Cambridge, MA

Member, Board of Directors

2010 – 2011

- Guided co-op store with \$40mm in sales as one of four Harvard undergraduates elected to the board by a voting body of 1,400
- Coordinated overhaul of online presence resulting in launch of new website; served on internet, audit, and finance sub-committees

ADDITIONAL INFORMATION

Interests: Fitness, nutrition, behavioral economics, investing, Euro-style strategy games, soccer, biographies, travel

NATHAN URRY

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Master of Business Administration Candidate; Major in Accounting

Philadelphia, PA
2017-2019

- Member of Investment Management, Boxing, and Tennis clubs
- Winning Team (#1 of 15) in the Wharton Club Stock Pitch Competition
- Fund Fellow Wharton Investment Management Fund. One of five applicants selected in first round application

BRIGHAM YOUNG UNIVERSITY

Bachelor of Science in Business Management (Finance Emphasis)

Provo, UT
2002-2008

- Awarded Brigham Young Scholarship (merit-based) 2004-2007 | GPA 3.8/4.0
- President of BYU's service organization (supervised 20K student volunteers). Led Utah state-wide Special Olympics
- Completed internships at a ~\$20mm student-run, venture capital fund and a \$625K student-run, equity fund

EXPERIENCE

OWL CREEK, \$2.5B Long-Term, Value-Focused, and Event-Driven Hedge Fund

Analyst, Generalist

New York, NY
Summer 2018

- Performed deep-dive analysis on large-cap, industrial equity and pitched findings to PM, resulting in 50% increase in position size
- Sourced and pitched investment team on technology long. Team supported building a position after 2Q18E earnings miss
- Performed fundamental research in sum-of-the-parts breakups, spinoffs, takeout candidates, failed IPOs, and other value-oriented special situations
- Evaluated long and short investments in industrial, materials, consumer, and technology industries

CITADEL – SURVEYOR CAPITAL, \$1.3B Industrials and Materials Portfolio Team (five person team)

Senior Associate, Industrials and Materials Team

Greenwich, CT
2015-2017
2014-2015

Associate, Industrials and Materials Team

- Generated 14% return in 2015 (team generated 7% and the target for team's strategy was 3%)
- Reported directly to Portfolio Manager
- Provided recommendations on entry points for longs and shorts, when to sell and cover, and sizing of positions
- Prepared diligence question lists and led diligence meetings with CEOs and CFOs on topics, including business model, competitive dynamics, supply / demand, and financials. Met with executives of ~40 companies at least once per quarter
- Covered ~40 industrial companies. Key subsectors: flow control, industrial distributors, industrial gas, and paper packaging
- Utilized catalyst-driven investment approach with emphasis on earnings setups, potential M&A, and other key events
- Maintained valuation ranges through discounted cash flow, multiples, and sum-of-the-parts analyses
- Forecasted company performance through modelling earnings power and cash flow

AEA INVESTORS, Middle Market Fund

LBO Investment Associate, Industrial and Healthcare Team

New York, NY
2012-2014

- Received top performance rating and bonus
- Evaluated investments by conducting industry and company due diligence, building financial and valuation models, and performing channel checks
- Monitored portfolio companies by attending board meetings, analyzing financial performance, monitoring cash flow, evaluating exit scenarios, and supporting analysis of add-on acquisitions. Portfolio companies included Cogent (third largest provider of hospitalists) and Evoqua (market leading provider of water purification equipment and services)

Selected Transaction Experience:

Evoqua (formerly known as Siemens Water Technologies and U.S. Filter): team signed \$1.1 billion carve-out

- Constructed product-level financial model to develop valuation perspective and sensitize forecast scenarios
- Worked with investment banks to craft presentation materials that were used to raise debt financing to fund the deal
- Authored and presented portions of memorandum for investment committee and equity co-investors

Skilled Nursing Facility Operator: team submitted \$335 million final round bid

BAIN & COMPANY

Senior Associate Consultant, Generalist

Boston, MA; Dallas, TX
2009-2012

- Received top performance rating and bonus
- Performed market diligence for private equity firms for one year as part of Bain's private equity consulting practice ("PEG")
- Representative Engagement: Growth Strategy (Toy Company). Determined company's electronic learning offering had significant competitive and cost disadvantages. Collaborated with strategy manager to persuade C-suite to exit product line

ADDITIONAL INFORMATION

- Two-year volunteer service mission in Indiana. Eagle Scout. Enjoy outdoors, sports, reading, traveling, and time with family

ZHUOHAO 'HOWE' WANG

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

MBA Candidate; Majors in Business Analytics and Finance

2017-2019

- Trek Director of Technology Club; Member of Wharton Energy, Consulting, Analytics and Food Clubs
- Recipient of Busch Memorial Wholesaler Fellowship for outstanding academic and professional accomplishments
- GMAT: 760 (99th percentile)

YALE UNIVERSITY

New Haven, CT

Master of Environmental Management: Energy Policy and Economics Concentration

2010-2013

- Selected as one of 12 students to receive the Yale Fox International Fellow based on academic achievement and leadership potential; studied at Tel Aviv University and interned at Israel Cleantech Ventures from 2011-2012

SICHUAN UNIVERSITY

Sichuan, CHINA

Bachelor of Science in Biotechnology

2004-2008

- President of Enactus Sichuan University chapter, selected as National Champion in Enactus National Competition for leading high quality and impactful regional ecotourism projects in Tibetan Plateau region

EXPERIENCE

INDUS CAPITAL PARTNER

San Francisco, CA

Summer Research Intern

Summer 2018

- Analyzed and screened nine companies across three cyclical sectors through bottom-up research. Cultivated, refined and presented single-stock recommendation and non-consensus views to portfolio managers
- Projected LNG consumption, quantified market sizes and identified opportunities across Asian LNG value chain

NAVIGANT

Washington, DC

Senior Economic Consultant

2014-2017

- Managed and designed firm's first Asia-focused energy export project by providing economic and environmental analysis of exporting U.S. coal to Asian markets; accelerated client's \$80 million expected transaction
- Managed 12 consultants to deliver collection of over 18,000 automobile transactions data entries, resulting in 60% reduction in cost and response time; streamlined and documented process for replication throughout firm
- Quantified evidence of racial discrimination in dispatch operations of major logistics company; analysis contributed to expected ruling of damage compensation of \$50 to \$100 million for company's minority employees
- Headed financial modeling and market due diligence for one of the largest international solar panel anti-dumping litigations that resulted in total damage claim of \$2,658 million for plaintiffs

GLOBALDATA ENERGY

New York, NY

Upstream Analyst

2013-2014

- Authored series of analyses on China's emerging technology, policy, and market strategies for shale oil and gas; analysis cited in Oil and Gas Financial Journal and other industry publications
- Built economic models and authored reports on geological, technological, and fiscal characteristics of energy assets in 17 APAC countries; selected as top analyst (among 59) based on performance in inaugural firm-wide analyst ranking

THE NEW YORKER MAGAZINE

Beijing, CHINA

China Bureau Researcher

2009-2010

- Delivered in-depth research and interviewed contacts for Bureau's investigative reporting across Asia, resulted in publishing seven high quality long-form investigative reporting pieces covering region's political, cultural and social issues
- Conducted research for Bureau Chief's book *Age of Ambition: Chasing Fortune, Truth, and Faith in the New China*, which won 2014 National Book Award for Nonfiction

ADDITIONAL INFORMATION

- **Interests:** Mentor, Israel-Asia Center (peer mentor for international students from Asia in Israel), backpacking (independently traveled to 50+ countries), journalism (publications include *Oil and Gas Journal* and *The Jerusalem Post*)
- **Skills and Languages:** Passed Level II of the CFA Program, R, SQL, Python, SAS, STATA, ArcGIS
- **Activities:** Member, Israel-Asia Center Fellow Selection Committee; Community Representative, Strait Talk Brown University and Forum for American/China Exchange at Stanford

LAUREN ZANEDIS

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Master of Business Administration Candidate; Dual Major in Multinational Management and Business Economics & Public Policy

Philadelphia, PA
2017-2019

- Joseph Wharton Fellowship recipient: awarded to students with outstanding records of academic, personal, and professional achievements. (62% of tuition was awarded.)
- Blumberg Family Term Fellowship sole recipient: awarded to student with outstanding undergraduate record in liberal arts.
- Nonprofit Board Fellow: chosen—under 10% acceptance rate—to serve as visiting board member of Pennsylvania Ballet.
- Member: Boxing Club, Global Impact Consulting, Out4Biz, Ski & Snowboard Club, Wharton Women in Business.

COLUMBIA COLLEGE, COLUMBIA UNIVERSITY

Bachelor of Arts; English Literature

New York, NY
2008-2011

- Dean's List recipient: awarded to top 10% of class.
- Vice Chair, Columbia College Senior Fund: spearheaded highest giving percentage of any CC class to date at 95%.

EXPERIENCE

BRIDGEWATER ASSOCIATES, LP

Hedge fund managing \$150B in global investments for 350 institutional clients

Senior Management Associate Intern

Westport, CT
Summer 2018

- Selected to participate on core management team, which is comprised of less than 2% of Bridgewater's population and is responsible for overseeing and improving every facet of firm.
- Developed and presented to senior management an innovative training strategy by acquiring and synthesizing internal feedback and evaluating internal and external best practices, and recommended on-campus recruiting strategy to optimize yield by strengthening brand awareness and value proposition.

FISSION VENTURES

Columbia University venture capital fund, founding fellow

Community Engagement Fellow

New York, NY
2018-Present

- Selected as fellow in 2018—under 5% acceptance rate—and have raised capital from over 40 Columbia alumni.
- Perform due diligence on prospective investments by reviewing pitch decks and conducting market research.

PHILLIPS

International art auction house with global sales of \$1B

Head of Deal Proposals, Americas

New York, NY and London, UK
2015-2017

- Led team of 5 in cultivation, execution, and delivery of sale pitches, successfully consigning works valued at \$300M.
- Managed all aspects of transaction execution, including seller solicitation strategy, art market analyses, marketing collateral design, marketing implementation, and post-close transaction implementation.
- Presented regularly to Phillips' executive leadership team on workflow status and revenue projections.
- Spearheaded initiative to shift business development from conventional printed proposals to digital, including 360° video and virtual reality experiences, reducing proposal turnaround times by over 60% from 7 to 3 days.
- *Select transactions:* Dr. Fredric Brandt's Collection (\$100M); Gerhard Richter's *Düsenjäger* (\$35M); Tommy Hilfiger's Collection (\$15M); David Zwirner's paintings by Mark Bradford (\$10M).

SOTHEBY'S

International art auction house with global sales of \$7B

Deal Proposals, Americas

New York, NY
2012-2015

- Oversaw business development unit of 2 direct reports in execution of collection sale pitches valued at over \$2B.
- Advised Sotheby's senior executives on company's competitive position based on historical trend dynamics.
- Leveraged market pricing data to persuade business-getting specialists to maintain profitability discipline.
- *Select transactions:* Mrs. Paul Mellon's Collection (\$218M); Andy Warhol's *Silver Car Crash* (\$105M); The Schlumberger Collection (\$85M); The Stuart Family's paintings by Norman Rockwell (\$60M).

ADDITIONAL INFORMATION

- **Skills:** Adobe Suite (advanced).
- **Interests:** Reducing recidivism; protection of cultural heritage; black and white photography; international travel; street art.