

## EDUCATION

**University of Massachusetts Boston | College of Management | Boston, MA**  
*Bachelor of Science in Management | Concentration in Finance*  
GPA: 4.0. Honors College, Member of the Dean's List, Member of the President's List

**Expected June 2022**

**Sacred Heart University, Fairfield, CT**

**September 2018-May 2019**

*Bachelor of Science in Business*

GPA: 3.9

- Basketball Team - Division 1 student athlete

---

## RELEVANT WORK EXPERIENCE

### ROARK Capital Group

**June 2021-August 2021**

*Private Equity Summer Analyst*

- Performed in-depth financial and operational due diligence on potential targets. Analyzed market trends, competition, and potential strategic partners using information obtained from multiple data sources for a Pre - IOI live deal
- Completed a summer case study consisting of an LBO model, Databook, and IC Memo
- Performed financial valuation analysis through the use of leveraged buyout methodologies, trading comparables, and precedent transaction comparables
- Relevant transaction experience across the retail, consumer, and beauty sectors

### BLK Capital Management, CORP

**September 2020-Present**

*Equity Research Analyst*

- BLK Capital actively recruits and selects intelligent and motivated students from all around the nation to craft a small team of elite investors
- Participated in a rigorous education program that covers quantitative and qualitative skills such as accounting, security selection and several valuation techniques
- Received extensive professional development through our sponsors, including Goldman Sachs, Lazard, & Morgan Stanley
- Engaged in active money management through real-time pitching to portfolio managers, e-board, and mentors
- Competed in a final stock pitch competition in front of professional mentors resulting in the contribution of investment ideas to the fund.

### Fidelity Investments

**June 2020-August 2020**

*Workplace Investing Sales Intern*

- Partnered with Multi-Product Sales executives to promote lead generation needs - created 50+ real business opportunities for Account Executives to close
- Researched engagement strategies for remote employees and presented recommendations based on findings for improving engagement to Workplace Investing Business Unit President
- Spearheaded the creation of new strategies to increase diversity in sales related roles
- Constructed a template for all key deals to be leveraged by the Head of Sales in Weekly Updates to Sales organization
- Prospected new consultants for Core Market leaders to develop lead generation efforts down market

### Marsh and McLennan (Mercer)

**August 2019-October 2019**

*Benefits Counselor*

- Engaged 1,000+ plan participants to provide guidance and solutions with questions regarding defined contribution retirement plans, defined benefit retirement plans, and health and welfare benefit plans
- Conducted research to resolve plan participant inquiries and provide timely follow-ups, resulting in higher customer satisfaction CSAT scored increased by 30%
- Measured success through openness to feedback/coaching, following all standard operating procedures, displaying reliability, and having a willingness to develop and consistently improve

### Foundation for Healthcare Equity | New York, NY

**May 2017-Present**

*Volunteer*

- Established an active role in community outreach by helping to coordinate volunteer activities, including a shoe drive
- Processed electronic mailings with Microsoft Outlook
- Created presentations with Google slides and powerpoint
- Traveled to Liberia, West Africa and Port Au Prince, Haiti to engage with the local community and distribute supplies
- Facilitated telephone outreach to major donors utilizing communication and sales skills resulting in over \$25,000 in donations

---

## RELEVANT COURSES

- |                        |  |
|------------------------|--|
| • Managerial Calculus  | • Economics                            |
| • Financial Accounting | • Computer Information and Systems 101 |

---

## SKILLS

- Computer: Mac, IOS, Windows, Microsoft Office, Excel, Word, PowerPoint, Outlook
- Interpersonal: clearly and concisely communicate ideas, strong listener, personable
- Project Management: attentive to business objectives, managing risk, organized
- Work Ethic: punctual, detail oriented, quick learner, flexible
- Leadership: proactively take initiative to identify and resolve problems, work well with others to accomplish common goals

---

## INTERESTS

- Traveling
- Sports (Basketball, Football, Track) (Activities/Involvement: Captain of the Varsity Basketball Team x2, Stock Market Club, Diversity Club)
- Stocks and Investments
- Computers