

STERLING BANKS

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INVESTMENT ANALYSIS | PORTFOLIO MANAGEMENT | ASSET VALUATION

Master of Finance (Completing May 20XX) | Target: Investment Banking

- One year of practical experience working with Colorado State University's Veteran's Fund team to invest \$430,000, donating all earnings to College of Business scholarship funds
- Experience in corporate valuation and forecasting future financial positions, presenting formal purchase proposals in large group settings
- One year of portfolio management as an analyst and intern – thrived in fast-paced, competitive environment

RELEVANT SKILLS

Bloomberg | SPSS | Wall Street Office (WSO) Applications | Visio | Financial Modeling | Risk Management | Tableau

FINANCIAL ANALYSIS EXPERIENCE

Graduate Teaching Assistant | **CSU College of Business** | Fort Collins, CO Aug 20XX – Present

- Conduct literature reviews and performance analyses, access Bloomberg Terminal, and gather financial data for research on investment theory and capital markets
- Create didactic materials and provide constructive feedback on students' fixed income security valuation projects

Financial Analyst | **The Veteran's Student-Managed Investment Fund, CSU** | Fort Collins, CO Jan 20XX – Dec 20XX

- Conducted research and analysis to identify investment opportunities, including analyzing financial statements, market trends, and company-specific factors to evaluate potential risks and returns of varied investment options
- Collaborated with fellow analysts to construct diversified investment proposal and present to fund leadership for consideration; proposal included robust capital budgeting analysis and compelling presentation to 25+ investors
- Tracked performance of selected portfolio worth \$430,000, providing periodic reports on investments
- Made buy, sell, or hold decisions based on ongoing research, market conditions, and portfolio investment strategy, including executing trades, managing order execution, and monitoring transaction costs

Finance Intern | **Charles Schwab** | Lone Tree, CO May 20XX – Aug 20XX

- Conducted financial analysis and research on investment opportunities (e.g. stocks, bonds, mutual funds, ETFs)
- Collaborated with client service teams to provide support to clients and address account-related questions
- Contributed to preparation of 15+ client reports, portfolio performance summaries, and investment proposals
- Aided in management of client portfolios worth upwards of \$350,000 by monitoring portfolio performance, tracking asset allocation, and analyzing risk exposures

RELEVANT PROJECTS

Investment Banking Simulation | **JP Morgan Virtual Experience Program on Forge** July 20XX

- Performed detailed company analysis on possible acquisition including key strengths, high level financials, deal rationale, and indication of valuation, updating valuation to reflect recent damage to manufacturing equipment
- Built financial model to indicate company's Discounted Cash Flow valuation and developed presentation for company's financial advising team at JP Morgan

Risk Management Case Study | **Advanced Portfolio Management (Graduate Course)** | CSU Sept 20XX

- Worked with group members to identify a local company's potential risks, assessed impact and probability, developed risk mitigation strategies, and evaluated the company's risk management practices
- Presented to a group of 25+ regarding findings, utilizing Canva to build a visually engaging slide deck

EDUCATION

Colorado State University, Fort Collins, CO

Master of Finance (STEM-Designated) | 3.8 GPA

Expected: May 20XX

- **Relevant Coursework:** Derivative Securities & Analysis, Enterprise Valuation, International Finance

Bachelor of Science, Business Administration | Concentrations: Finance and Real Estate | 3.6 GPA

May 20XX