

## EDUCATION

### **Soka University of America - Cumulative GPA: 3.78**

B.A. in Liberal Arts, Social & Behavioral Sciences: Economics

Aliso Viejo, CA

Expected Graduation: May 2023

**Honors/Awards:** Dean's List (3 Semesters), Soka Merit Scholarship (2019-2023), Impactathon Winner (Team Tooke)

**Relevant Coursework:** Calculus, Financial Economics, International Economics, Linear Algebra, Macroeconomics, Microeconomics

**Certifications:** Investment Foundations (CFA), Financial Edge Investment Banking Certificate

### **The University of Chicago Booth School of Business**

Summer Business Scholars Program, Innovation & Entrepreneurship

Chicago, IL

Completion: August 2020

## EXPERIENCE

### **Bank of America,**

*Global Investment Banking Summer Analyst, Healthcare Group*

New York City, NY

June 2021-Present

- Develop differentiated skills across M&A, LBO, SPACs, debt & equity products and sharpened critical client management skills
- Build DCF, merger models & LBO models for a comprehensive analysis of a large-cap company
- Compile comprehensive company data, spread company comparable analysis and prepared excellent pitch book pages for a client
- Acquire industry knowledge & expertise across the Medical Technology, Health Services and Life Sciences verticals
- Collaborated with teammates from other divisions to build a sustainability linked loan program for firmwide management

### **SUA Career Development Office**

*Student Assistant,*

Aliso Viejo, CA

March 2021 – Present

- Co-hosted a campus wide event and led a presentation on network development through LinkedIn
- Develop channels to create access for students interested in international career opportunities through
- Contribute to short term and long-term strategic planning through data collection and compilation
- create social media content and promote career services events and activities

## PROJECTS & COMPETITIONS

### **Tooke Fabrics, Finance & Strategy Lead**

January 2021 – Present

- Lead the team in our business strategy and plan which secured us at a spots at several fund raising competitions
- Co-direct all fund-raising efforts and investor relationship management efforts

### **Paul Merage School of Business- University of California, Participating Entrepreneur**

January 2020 – May 2021

- Business idea, Tooke Fabrics, emerged second place and won \$2500 in the social enterprises category at the grand finale
- Business idea, Arsenova, emerged Semi-finalist out of over 50 ideas and businesses in the competition

### **IE Business School & Focus Finance, International M&A Competition participant- Close the Deal**

October 2020 – Present 2021

- Conduct market and industry research aimed at finding a potential merger under the mentorship of the renowned Paris L'Etraz

## LEADERSHIP

### **Vassar Sustainable Investment Fund, Vice President**

June 2021-Present

- Recruit, train and co-oversee the organization's management of \$50,000+ AUM with a focus on investments that emphasize E.S.G
- Prepared and Pitched TJ Maxx to our portfolio managers and added the company to our portfolio

### **Soka Black Students' Union, President**

July 2020 – June 2021

- Led the formation of the university's first Coalition of Affinity Groups and first Black Career Development Board
- Established external relationships with organizations like Ripple match and Stanford University Black Students Association

### **Soka Students' Union, Club Senate Treasurer & Students Leaders Assembly Member**

May 2020 – June 2021

- Coordinated the university's first virtual campus-wide Club Expo and secured funds for all active university clubs to operate

## PROFESSIONAL DEVELOPMENT

### **Harvard University Venture in Management & Virtual Peek Experience**

June

- Completed two business cases using the Harvard case approach and explored business education at Harvard University

### **Portfolios with Purpose Fellowship**

June 2021 – Present

- Performed fundamental analysis and constructed a portfolio of global equities with strong year over year performance

### **BLK Capital Management, Equity Research Analyst**

September 2020 – Present

- Researched & pitched Tencent Holdings Ltd. and Nature's Sunshine (NATR) at group meeting and annual conference, respectively

### **Sponsors for Educational Opportunity (SEO), Investment Banking Trainee**

January 2021 – Present

- Developed intermediate financial modeling, valuation, and accounting skills whilst building other critical professional skills

## OTHER ACTIVITIES

- **Kohlberg Kravis Roberts (KKR), Undergraduate Insights**
- **Blackrock, Find Your Future Forum**
- **PIMCO, Prep Program**
- **McKinsey & Company, Launch: Leadership Incubator**
- **Ares Capital Management, Diversity in Investing**

- **LLR Partners Diversity Collaborate, Participant**
- **Goldman Sachs, Summer Insights Series**
- **J.P. Morgan, CIB Summer Enrichment Series**
- **Credit Suisse, Discovery Bootcamp**

## OTHER SKILLS, INTERESTS,

**Skills:** Excel, Financial modeling, French (basic), PowerPoint, Python (Basic), Qualitative business analysis, Research, Valuation

**Interests:** Afrobeat Dance, Culinary Arts, Non-fiction Writing, Piano