

Allison Rosenberg

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An Investment Banker with seven years of experience, specializing in equity research, strategic investing, and financial modeling. A strong history of performing due diligence on investment opportunities to maximize ROI potential for high-net-worth clients.

Education

Bachelor of Science (B.S.) Economics

University of San Francisco,
San Francisco, CA
September 2011 - May 2015

Key Skills

- Investment Banking
- Financial Analysis
- Economics
- Client Relations
- Portfolio Management

Certifications

- Series 7, FINRA, 2015
- Series 63, FINRA, 2015
- Series 65, FINRA, 2015

Professional Experience

Investment Banker

Johnson and Goldman Inc., San Francisco, CA | October 2017 – Present

- Develop financial models and investment strategies for client portfolios valued at \$300K-\$1M and provide recommendations for valuations, M&A, and product offerings
- Conduct equity research, identify long-term investment opportunities in companies with best-in-class management teams and business models, and recommend investment opportunities in businesses committed to solving complex customer problems
- Conduct in-depth valuations of intangible assets for purchase price allocations by evaluating income, market indicators, and company financials

Investment Banker

Invest Today Inc., San Francisco, CA | May 2015 – October 2017

- Performed financial analysis and determined valuations for startup technology companies, which included providing recommendations to investors on business based on economic data, product use case, and organizational effectiveness
- Created in-depth financial models using data and long-term market indicators to inform investment decisions and establish long-term ROI potential