

Professional Experience

Investment Banker

Klein and Davidson Consulting, New York, NY | September 2016 – Present

- Create dynamic investment strategies for client portfolios valued at up to \$1.5M, develop complex financial models, and deliver presentations to clients and prospects
- Build relationships with corporate leaders and lead investigative meetings between high-profile investors and C-level executives during the due diligence phase
- Identify opportunities within the clean energy space, including solar companies and electric vehicle manufacturers

Investment Banker

Invest Today Inc., New York, NY | May 2011 – September 2016

- Conducted equity research for a financial investment firm to identify and evaluated opportunities to invest in companies trading at below market value
- Performed due diligence on businesses by evaluating industry fundamentals, creating financial models, and attending industry trade shows

Education

Bachelor of Science (B.S.) Economics

Columbia University, New York, NY | September 2007- May 2011

Certifications

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

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An Investment Banker with 10+ years of experience, specializing in providing investment strategies for opportunities within the alternative energy, automotive, and utility industries. A proven track record of maximizing portfolio growth and profitability by evaluating competitive advantages and identifying long-term market potential.

Key Skills

- Investment Banking
- Financial Modeling
- Investment Strategy
- Relationship Building
- Competitive Analysis