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Page one
of three

CHIEF OPERATING OFFICER

20+ years of strategic operations and business transformation leadership experience. Led teams in diverse sectors and contexts including rapid scaling, M&A, restructurings, IPOs, and fundraising. Record of transformational improvements in efficiency and organizational effectiveness that drove substantial profit gains.

- Led four successful business transformations:
 - Developed and implemented the **operational restructuring plan** for a turnaround portfolio company; achieved breakeven following a \$5M EBITDA loss.
 - At retailer, led operational improvements that **turned a revenue decline into a 3X increase** in 18 months.
 - At tech SaaS company, **added incremental 25% to EBITDA**, resulting in a successful IPO.
 - At global financial firm, enabled 4X revenue growth via **centralization of operations**.
- Experience includes merchandise assortment optimization, inventory efficiency, process optimization, and **establishing metrics and accountabilities**.
- Built and managed high-performance, diverse teams from the ground up, including hiring C-suite executives. Known for **high staff retention** and development including promotions.
- Implemented **repeatable process discipline**, while creating a cost-conscious culture across organizations.
- Partner productively with all stakeholders including CEO, CFO, CMO, Board, middle management, founders, and institutional investors. Overcame inertia and **obtained buy-in for major change** at all levels.
- Additional leadership experience includes FP&A, e-Commerce, Procurement, Logistics, Merchandising, Inventory Management.

***From Reviews and Feedback:** “a complete leader...very effective communicator...energizing...uncommon combination of leadership and technical skills...outstanding business partner...strategic mindset and a bias for action...an “even keel” that inspires confidence”*

EXPERIENCE

MyPrivateEquityFirm

2012 – Present

Boutique operationally-focused PE firm targeting middle market, growth, and venture investments.

Director, Interim COO, Head of Business Transformation

One of four principals. Held strategic and operational leadership roles across three portfolio companies, including Interim COO. Serve on Board at two portfolio companies.

- As interim COO at portfolio company:
 - Supported the more than **doubling of revenues** in just 12 months.
 - **Transformed operational infrastructure**, leading to 10X gains in product shipping efficiency.
 - **Recruited the Operations leadership team**.
- Developed the **cost and operational restructuring plan** that achieved a near-term path to breakeven from an annual \$5M EBITDA loss.
- **Recruited top-tier leadership** across portfolio companies, including VPs, COOs, Controller, and CMO.

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SENIOR FINANCE EXECUTIVE - CFO

Experience across every aspect of corporate finance, as well as with capital markets. Considered a strategic thought partner to C-Suite colleagues. Deep forecasting, modeling, and SEC reporting experience. Record of building and leading high performing and diverse teams through periods of uncertainty and rapid change.

- Led Treasury and Investor Relations teams and partnered closely with every finance function, including **FP&A, Tax, Controllershship, and Business Finance**.
- Deep understanding of broad range of sectors, business models, and cycles via **15 years as an equity analyst**.
- Critical role in **two major M&A transactions**; sale of TopBrand Wellknown Division and subsequent TopBrand sale to private equity. **Led diligence and negotiations** to close \$90M investment in U.K. digital services firm.
- Capital Markets experience:
 - **Raised ~\$9B of new term loans** and bonds in challenging 2020-22 market environment.
 - Spearheaded capital allocation initiative, yielding **\$1B new share repurchase authorization**.
 - **Vetted 25+ IPO's**/secondary offerings, launched coverage of 15+; engaged with bank capital markets.
- Key member of working group developing strategy for **financial reporting platform** transformation.
- Frequent **presenter at Board, Audit, and Finance committee meetings**; attended all board meetings.
- As head of Investor Relations, led Investor Day transformation story that **drove 9% same-day share increase**.
- Known for close collaboration with business leaders, Legal, HR, Marketing and Communications.
- Built and led high-performing, collaborative teams of up to two dozen finance professionals. Known for **attracting top performers, high retention**, and staff development including promotions.

From reviews: "strong on diversity...brings teams together...drives clarity <and> collaboration to deliver results...smart, thoughtful, objective and pragmatic...commercially adept"

EXPERIENCE

TOPBRAND, City, State

2014 – 12/20XX

Senior Vice President, Head of Investor Relations and Treasury

Led broad range of strategic and finance initiatives across the company. Reported to CFO; member of CFO leadership team and TopBrand Operating Committee. Managed team of two dozen finance professionals.

- Led Treasury (debt/derivatives, cash operations, insurance, retirement).
- **Raised ~\$9B of new term loans and bonds** in challenging pandemic environment extending maturities and strengthening the balance sheet.
- Led capital allocation initiative. Board presentation led to **\$1B new share repurchase authorization**.
- M&A experience: partnered with external advisors on diligence and presentation preparation for sale of WellKnown Division (\$3.5B EV) and TopBrand sale process (\$35B EV); **involved in deal strategy and due diligence sessions**.
- Designed and **led IR strategy and Street outreach** during period that included strategic review, activist investor, leadership transitions, WellKnown Division segment spin/sale, and take-private of core business to private equity.
- **Drove single-day 14% increase in share price** via introduction of "New Company" at XXXX Investor Day.
- **Collaborated with FP&A** to develop and update financial guidance and with **Controllershship/Legal** on SEC filings. Maintained external financial model.
- Participated in all regular **Board, Audit, and Finance committee meetings**. Presented on capital planning, IR, and Treasury.

- Received **Chairman's Award**, highest internal honor, for outstanding achievement.
- Ranked in **Institutional Investor All-America Executive Team** survey for IR program and analyst day.
- **Re-built 12-person global Treasury team** following WellKnown Division sale.
- **Executive sponsor of XXXX business resource group.** Formal and informal mentor.

TOPGLOBALBANK, *New York, NY*

2002 – 2016

Managing Director, Equity Research, Senior Analyst

Led team of four analysts to develop investment recommendations for publicly traded companies in business, information, IT and professional services, payments and payroll services, staffing, and education sectors.

- **Ranked in Institutional Investor magazine survey** in Business, Education, and Professional Services (2008-16).
- **Vetted 25+ prospective IPO's and secondary offerings**, launched coverage on more than 15 IPO's.
- Chosen as **member of XXXX Committee**, a cross-sector stock portfolio of best US listed investment ideas.
- Hosted **Services One-on-One Conference** for 10 years, attracting 30 companies and institutional investors.
- Ranked in **#1 quartile in each annual 360-degree performance review**.
- Interviewer for Diversity MBA Scholarship, lateral hires, and summer interns. Conceived of diversity luncheon initiative.

TOPBRAND2, *New York, NY*

1999 – 2000

Manager, Interactive Investments

Evaluated, structured, and executed equity investments in start-ups as member of strategic venture capital group. Led cross-functional teams through diligence process (market potential, strategic fit, management assessments).

- **Led \$45 million investment in YYYY**, a Japanese digital services firm, including diligence and negotiations.
- **Assessed strategic alternatives for non-core businesses.** Presented partnership, JV, and spin-off options to COO.

BIG CONSULTING FIRM, *Boston, MA & Paris, France*

1996 – 1999

Senior Associate Consultant

Developed, presented, and implemented strategies for clients across a wide range of industries. Managed Associate Consultant teams. Ranked in top category of peer group in every review.

EDUCATION

IVY LEAGUE BUSINESS SCHOOL, Master in Business Administration

TOP RANKED COLLEGE, Bachelor of Arts, *magna cum laude*, double major in Economics and French. Elected to Phi Beta Kappa Society. Awarded XXXX Prize in Economics. Elected president of YYYY.

PERSONAL

- Bilingual in French. Dual US/French citizenship.
- Non-profit board experience: The WellKnownNon-Profit.

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SALES MANAGEMENT EXECUTIVE – EQUITIES, FIXED INCOME, FINANCING

Led sales teams across the entire capital structure. Bring diverse product experience and a track record of data-driven market share and revenue growth.

- Drove new revenue with the appropriate return profile in every sales leadership role over the past 10+ years; in last two roles at TopInvBank:
 - **Generated 18% CAGR** from 2019-22, Prime Services/Equity Distribution, via disciplined approach targeted to client outcomes.
 - **Drove 200bp wallet share gain** in Americas region equities distribution from 2018-22.
- Successes driven by:
 - Strategic, **data-driven approach** to understanding and addressing gaps in client portfolios.
 - Breaking down silos between internal product verticals, **creating cross-sell opportunities**.
 - **Experience across capital structure** that facilitates aligning capabilities with client objectives.
 - Prior track record as a **consistent top producer**, boosted by broad and deep product knowledge.
- **Led teams of up to 200** sales professionals; retained top talent in a competitive environment by creating a strong, positive team culture.

From review: "strong on diversity...brings teams together...drives clarity <and> collaboration to deliver results...smart, thoughtful, objective and pragmatic...commercially adept"

EXPERIENCE

TopInvBank

2005 – Present

Held several roles across Securitized Products, Prime Brokerage Sales, and Equities Distribution.

Head of Equities Distribution, Americas (Mar. 2018 – Present)

Lead a team of ~200 sales professionals across Cash Equities, Equity Derivatives and Prime Services. Drive a holistic approach to client coverage across Equities and Markets. Focused on market share gains by closing gaps (client and product) in both intermediation and financing.

- **Attained a ~ 18% CAGR** for U.S. Equities sales revenue (ex-syndicate) from 2019-2022.
- Achieved the **strongest years on record** in 2021 and 2022.
- **Grew sales revenue by over 50%** for Global Equities (ex-syndicate) from 2018 to 2022.
- **Gained over 200bps of wallet share** in The Americas region from 2018-2022.
- **Held key leadership committee roles:** member of X Management, Global Y Management and Global Z Management Committees.

Head of Prime Brokerage Sales, Americas (Feb. 2016 – Feb. 2018)

Oversaw the growth and diversification of equity financing revenue as major product gaps were closed (e.g., US Portfolio Swap).

- Led team in **growing market position from #12 to #7** in two years, by aligning distribution across equities.
- Established presence in **synthetic financing around large holdings**, creating a significant new revenue stream, by guiding the rewriting of Americas swap guidelines in partnership with Legal/Compliance.

- New synthetic financing capability led to **expansion of relationship** with one of the largest activist funds.
- Developed relationships with two large, levered ETF providers, which ultimately led to highly lucrative **equity swap financing and commission revenue**.

Head of Securitized Products Distribution (Jun. 2014 – Jan. 2016)

Led a team of 28 sales professionals in the United States while working with cross-asset sales globally.

- **Steadily grew revenue and market share.**
- Viewed as a **trusted advisor** to largest clients, staff, and colleagues; leveraged deep product knowledge.
- Tailored risk solutions across agency and non-agency residential and commercial **mortgage-backed and asset-backed securities**.

Co-Head of New York Sales, Securitized Products (2012 – 2014)

Led team with a focus on asset managers and hedge funds, while continuing as a producer.

Securitized Products Sales (2005 – 2012)

- **Single largest producer** within securitized products sales.
- **Top 3 producer in markets** in 2010.
- Key role in **building firm's presence into a market leader** (from zero).

BigGlobalBank

1996 - 2005

New York Mortgage Sales, Director (2004 – 2005)

San Francisco Mortgage Sales (2003 – 2004)

Chicago Mortgage Sales (1999 – 2003)

Joined sales and trading analyst program in 1996. Invited into Famous Division in 1998. Placed into NY Mortgage Sales.

- In each region quickly developed successful new relationships, including key account relationships.
- Consistently outperformed expectations, leading to roles with larger account responsibilities. For example, in San Francisco, beat revenue expectations by 2x.

EDUCATION

WellKnown University, Easton PA., May 1996

A.B. Economics & Business

Magna Cum Laude: GPA 3.8; Major 3.9

Licenses and certifications: Series 24, 7, 63, 3

SENIOR CORPORATE / IN-HOUSE COUNSEL, GC

15+ years developing legal and business strategy and leading teams in international environments. Expert in drafting and negotiating contracts that have enhanced growth while minimizing risk.

- **Enhance regulatory compliance globally**, e.g. spearheaded global compliance technology platform that enabled client to borrow at lower rates.
- Leverage global legal expertise in **establishing new business units**, e.g. partnered with local counsel in Mexico to set up a corporation, including employment agreements, lease negotiation, etc. Successful launch increased company margins by 8%.
- Successfully scaled a legal practice; **co-founder of boutique international law firm** with a tech focus. Grew revenue from \$0 to \$20 million. Former **Assistant GC for Target**.
- Global perspective: **worked with 30 countries** in North America, South America, Europe, Africa, Asia.
- Assembled and **led high-performing teams** across borders and functions, including attorneys, accountants, payroll, sales and business development.
- **Partnered productively with c-level executives** and key business units including accounting, finance, marketing, government affairs, HR.

Technology Transactions

Employment Law and Compliance

Corporate Finance Transactions

Venture Capital

Software Licensing Agreements

Management of Legal Resources

Legal and Regulatory Compliance

Securities Law

Litigation

From [LinkedIn recommendations](#) and comments: "great business partner...collaborative...motivational... a pleasure to work with...thought leader...highly proactive"

EXPERIENCE

X Global Partners LLP, New York, NY

2013-Present

Co-Founding Partner / Acting Senior Corporate and In-house Counsel and GC

Co-founded a boutique international law firm that serves as outside counsel to companies in the IT sector and the funds that invest in them. **Grew revenue from \$0 to \$20 million**. Represent over a dozen clients with revenues as high as \$1 billion. Representative engagements include:

- **WellKnown Solutions Inc.** (Nasdaq: XXXX)- Serve as counsel for global fiber access leader.
 - Represented company in its **acquisition of European firm**. Shepherded acquisition to completion ahead of schedule, ensured smooth execution. Legal support was so successful that company chose Aragon for future engagements over leading brand-name law firm.
 - Partnered with the general counsel in developing an enhanced **corporate governance** framework that enabled borrowing at lower rates. Success of this engagement led to new requests for legal support.
- **Best Solutions LLC**- Outside counsel for global technology firm that saw 100%+ revenue growth in 2018.
 - Relied on for **all legal matters**, from employee issues to acquisitions and joint ventures.
 - Proposed and implemented **incentive-based employee retention strategy** in anticipation of NJ anti-non-compete legislation. Result: expecting a 20% decrease in employee turnover.
 - Implemented **legal best practices** via use of templates for most major contracts routinely required.

- **Giant Capital Partners-** Counsel to a VC co-invested with the Government of Mexico.
 - Served as **head counsel on over 80 deals**, enabling firm to triple AUM over a two year period.
 - **Oversaw 40+ acquisitions** from term sheet through closing. Developed and reviewed dozens of cross-border entity structures.
 - Analyzed **intellectual property** protection for technologies, delivered recommendations.

Technology Services & Company, Inc., New York, NY

2011-2013

General Counsel

Oversaw all legal and compliance matters for a multinational technology services company and its app development subsidiaries, including an app developer whose clients include Nielsen, E! Entertainment, NBC, and MobiTV.

- Drafted, reviewed, and **negotiated roughly 50** complex multiparty services and licensing agreements.
- Handled all employment matters, resulting in a **70% decrease in employee disputes**.

WellKnown Capital, New York, NY

2007-2011

Counsel

Legal and compliance advisor to a boutique investment bank.

- Credited with bringing in eight large Latin American investors and clients, including negotiating terms.
- Implemented **corporate governance** protocols for sell-side clients in areas where significant gaps existed. Results included substantial purchase offers where none came before, and increased company valuations.

Target, Inc., New York, NY

2005-2007

Assistant General Counsel (2006-2007)

Senior Counsel (2005-2006)

Led a legal team that supported the Store Operations, Real Estate, and Public Affairs units.

- Reduced the number outside legal firms by selecting the best firms based on a set of objective rating criteria; result: **reduced outside counsel legal costs by 20%**.
- Bridged the communication gap between the Environmental Sustainability team. Result was improved public outreach.
- Managed real estate litigation; **reduced litigation costs by more than 25%** over a two-year period.

Real Estate Group, New York, NY

2003-2005

Counsel

Litigated contract disputes for a New York-based real estate investment and property management firm. Had an approximately **90% success rate**, resulting in sizable recoveries.

EDUCATION

- **Columbia Law School**
- **Columbia College of Columbia University** (Bachelor of Arts)

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INVESTMENT EXECUTIVE / MANAGING DIRECTOR

Track record of leadership success across the largest and most influential investment advice platforms in the financial services industry.

- Fortune100-1
- Fortune100-2
- Fortune100-3
- **Responsible for up to \$600 billion** in investment advisory assets and 1 million+ client accounts.
- Relied on for team leadership to accomplish the **toughest, most important strategic assignments**, e.g. creation of new investment advice channels, wind-down and closure of six separate businesses.
- Achieved a dozen product, program and channel “**firsts**” in the industry throughout 15+ year career.
- Recognized for **building productive influential relationships** with key stakeholders, including Financial Advisors, that enabled quick adaptation to substantial organizational change.
- Track record of successful team leadership:
 - Demonstrated high retention of productive staff, e.g., in five years of team leadership saw **100% retention of top performers**. Known for staff development, including promotions.
 - Consistently **motivated teams to achieve peak performance**, e.g., on-boarded 85 new products in two months (10x normal rate) in a time of great disruption.
 - Received three awards and formal **recognition for team leadership**.
 - Known for **calm clear-eyed leadership** under pressure, via successful military and corporate leadership experience in high-stakes situations.
- Hands-on, **expert knowledge of investment process** and products; CFA Charterholder.

From Performance Reviews: “a complete leader...very effective communicator...energizing...uncommon combination of leadership and relationship skills...outstanding business partner...strategic mindset and a bias for action...reputation for intelligence, integrity <and> an “even keel” that inspires confidence”

PROFESSIONAL EXPERIENCE

Fortune100-1, New York, NY

2016 - Present

Global Wealth and Investment Management

Managing Director, Head of Managed Strategies and Channel Management

Manage investment advisory business across Private Bank, international and institutional client segments. Cover managed investment advisory programs and firm/asset manager strategies including business strategy, platform management, risk management, investment product menu and overall stewardship.

- Lead team responsible for **administering 1M+ client accounts / up to \$600B in client assets** (comprising SMA, Mutual Fund, and ETF strategies), three additional dual-contract SMA programs, and Robo-advisor and digital hybrid for mass affluent clients.
- Led launch of the firm’s **robo-advisor offering** with consumer bank in 2017, **raising \$4B in client assets** and **transforming company into a leader** in the digital advice space.
- Oversaw \$140B in new client flows to Managed Strategies from 2016-2019 via **acquisition strategy, product launches**, platform enhancements, sales and marketing, and collaboration with the Chief Investment Office.
- Introduced **private wealth investment advice program** for institutional and ultra-high net worth clients with **first-to-market** features, attracting \$5B in assets and projected to double by year-end 2020.

BETHANY SELDANA, M.S., ICF ACC

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CLO / DIRECTOR OF LEADERSHIP DEVELOPMENT

Extensive global experience; established capabilities in startups and transformed corporate-wide L&D operations; deep background in performance consulting and rapid design to manage the current digital disruption powered by artificial intelligence and machine learning.

- Directed company-wide learning strategy at **Microsoft, Hilton and GE** – 250k employees, 60 countries.
- **Built true strategic partnerships** and engagement with key internal C-Suite stakeholders
- Key role in building an **award-winning, worldwide management culture** at Hilton
- Results include:
 - Led Board-sponsored Strategic Workforce Planning - more than **doubled internal promotions** of the top 200 executives; **improved executive retention** by 50%
 - Credited by EVP with **tripling revenues** at Wellknown by creating the best executive networks
 - Delivered **92,000 days of management development** annually; streamlined delivery across brands resulting in 16% savings in operating costs
- **Recognized by academic thought leaders** for strength of programming including published outcomes
- **Utilized cutting-edge new technologies** for personalized, self-curated content, rapid design, networking, best practices and innovations, mobile delivery, virtual breakout groups, new collaboration platforms
- Certified in **over a dozen assessments from renowned providers** that are central to performance results

From reviews and LinkedIn recommendations: “A proven leader ... The ultimate professional - very smart, very goal oriented and practical, and absolutely committed to lifelong learning. ... One of the most profoundly genuine colleagues with whom I’ve had the pleasure of working”

EXPERIENCE

WELLKNOWN THINKTANK, Chicago, IL

2014-2019

Global think tank providing the world's leading organizations with the practical knowledge they need to improve performance and better serve society

Executive Director, Human Capital

Directed ~ 45 Human Capital Councils and ~ 30 National Conferences; managed a team of 40+

- Grew the Human Capital practice, **tripling revenues**
- Cemented its reputation as **one of the most revered sets of executive networks in business** – the go-to Learning and Talent Development resource for CHRO's and other C-Level executives
- Transferred practitioner best practices into compelling National Conferences on several Learning and Talent Development topics – e.g. *Diversity and Inclusion, Advancing Women in Leadership, Strategic Workforce Planning, Human Capital Analytics*; considered **“the best conferences in the business”**

MICROSOFT, Redmond, CA

2007-2013

Global Director, Learning and Development

Developed a global learning culture and corresponding new technologies and solutions (*Managed \$2.5M budget*)

- **Transformed global business** by integrating learning and communications into divergent upstream and downstream businesses resulting in game-changing new business models and \$ billions in revenue

- **Established strategic university and consultative alliances** for custom programs, e.g. with Harvard Business School, Stevens Institute, eCornell, Korn Ferry, Franklin Covey, DDI, etc.
- Launched an online Corporate University with custom content, self-curated authoring, blended experiences, that **increased course completions by 97%**

GENERAL ELECTRIC, Stamford, CT

2003 – 2007

Corporate Director of Executive and Leadership Development

Directed the company's enterprise executive and leadership development strategy, programs, aligned to global initiatives (*Managed \$3.8M budget*)

- Built **true strategic partnerships** and engagement with key internal C-Suite stakeholders:
 - More than **doubled internal promotions** of the top 200 executives
 - **Developed talent** and enhanced cross-business capabilities; 25% of executives received promotions
 - **Reduced executive turnover** by 50%
- **Built and led an Executive Development practice** that drove success of Strategic Workforce Planning:
 - Partnered with thought leaders in curriculum development, including Harvard, Wharton and more
 - Curriculum included *Strategy and Business Models / Simulations; Global Trade; Organization Design; Executive Presence; Global Leadership; Managing Talent Pipelines; Change Leadership*

HILTON HOTELS INTERNATIONAL, Washington, D.C. and Frankfurt, Germany

1990 – 2002

Vice President, Worldwide Learning Resources

Director, International Organization and Management Development, Internal Communications

Directed enterprise-wide learning strategy and execution for 250,000 employees in 60 countries across 12 brands. Managed \$12M budget.

- **Increased recruitment capability**, operations standards, retention, and engagement, which impacted brand equity, customer experience and loyalty, organic growth and M&A integration
- Directed delivery of 92,000 management development days annually. Streamlined programming **resulting in 16% savings in operating costs.**
- **Reduced redundancy across brands**; Hilton is recognized as the franchiser of choice for efficient cross-brand executive and management development
- Reporting to the President of International Lodging, directed management development which **grew from 18 to 260+ hotels in sixty countries** over eight years
- Recruited, trained and coordinated coaching of 5,000+ hotel executives and managers, resulting in **industry-leading retention, talent management, strategic workforce planning**
- Managed delivery of **2,400+ management workshops** in eight years, conducted in seven languages
- Created an internal, video-based **TV news magazine**, *The Worldwide Business Forum* (a sixty-minute, quarterly news program which ran for over ten years) to showcase hotel innovation, best practices and successful operational initiatives

EDUCATION

Georgetown University, The X Institute, Washington, D.C.

Master of Sciences, Human Resource Development

The University of Chicago, Chicago, IL

Bachelor of Arts with Honors, Liberal Arts

ELLEN LASTNAME

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CLIENT/DONOR RELATIONSHIP EXECUTIVE

Strategic philanthropic leader **specializing in charitable asset growth and leadership giving**
Consistently met or exceeded revenue targets every year over a successful career

- **Achieved organizational excellence** via leadership, according to a half-dozen senior executives
- Achieved **high retention of clients/donors**, e.g. improved retention by over 100% in three years
- Achieved consistently high **client satisfaction** as demonstrated by annual revenue growth
- Built strong client relationships, producing six and **seven figure gifts** as part of the **Campaign for Princeton and Yale Universities**
- Built **productive relationships with stakeholders** e.g. board members, c-suite, vendors, finance, legal
- **Data-driven, analytic leader**; led build-out and leveraging of CRM platform analytics, including segmentation, revenue potential, behavioral trends, forecasts, test/control; **Salesforce CRM expert**
- Led teams of up to 25 professionals; saw **high retention**; known for **staff development/promotions**

*From **LinkedIn Recommendations**: “outstanding leadership, customer service, and development skills... Ellen’s kindness and support completely transformed my experience... a joy and honor to work with Ellen”*

EXPERIENCE

LASTNAME PHILANTHROPIC ADVISING, Chicago, IL

Jan 2019 - Present

Philanthropic Advisor

Create and execute philanthropic marketing strategies to grow revenue, expand customer loyalty and increase brand awareness

Partnering with three client-CEOs/business owners with multiple retail locations. Enhance competitive advantage by creating a philanthropic identity to drive customer allegiance, grow the customer base and improve annual sales. **Achieved approval of strategic roadmap** among all three clients; now in execution phase.

WELLKNOWN NON-PROFIT, Chicago, IL

2016–2019

Chief Development & Marketing Officer

National non-profit serves over 5M children with over 7M books annually

Held key strategic leadership role in close partnership with the CEO. Directed the national fundraising, marketing and corporate and foundation relations team of 14 people, including several regional directors

- Led fundraising that:
 - **Doubled operating revenue** in two years, including an endowment, the first such gift in its 30-year history
 - **Tripled the Board reserves** in three years
 - **Obtained the first million-dollar grant** in eight years
- **Built team of 14** strategic revenue generators over three years; saw low turnover of high performers
- Created profitable relationships with clients, and **increased donor pool by 35%** over three years
- **Deepened organization’s analytic capability** including CRM and reporting structure relied on by CFO/ Board
- **Steered national rebranding** with CEO and Board, including oversight of new website and all external marketing, communications & social media

CHICAGO MEDICAL, Chicago, IL

2012–2015

Chief Development and Marketing Officer

Non-profit that provides critical care transport to the region's most severely ill and injured patients

Grew number of donors by 100% in first year; built fundraising infrastructure, including annual fund, marketing

- **Increased annual giving by 75%** in two years
- **Grew average gift** by investing in client focused communications and service
- **Enhanced partnerships** with six Harvard Teaching Hospitals, expanding brand awareness
- **Deepened organization's analytic capabilities**, including CRM and reporting structure relied on by Board

GLOBAL EDUCATION, Chicago, IL

Jan-Dec 2011

Philanthropic Consultant/Strategic Leader

Non-profit - reduces poverty through education and social and economic development programs in 24 countries.

Developed a targeted fundraising strategy. Built infrastructure, including annual fund, marketing; led two first-ever special campaigns with Board members and international funders. Restructured donor website, developed newsletter and e-appeals. **Doubled the number of donors; increased donor awareness and revenue.**

THE HUMAN CENTER, Chicago, IL

2009–2011

Vice President of Development and Marketing

Comprehensive health and human services agency for under-served urban community; \$30M operating budget

Hired to lead successful development turnaround and bring to more stable financial footing. Spearheaded new fundraising and marketing strategies, board development, internal team leadership.

- Transformed major annual **fundraising event; netted 200% revenue increase**
- **Set a new fundraising record**, reversing five-year decline, by growing revenue and decreasing expenses
- **Increased board membership** from 8 to 15 and boosted board giving by 125% in first year

GOALACHIEVE, Chicago, IL

2007–2009

Senior Director of National Development

Non-profit startup closing the Opportunity Divide by providing urban young adults with the jobs training.

Partnered with CEO to create \$20M national revenue generation strategy focused on deepening client relationships and growing corporate partnerships. Managed team of five and budget of \$1M.

- **Exceeded \$7M annual goal** for central office through corporate, foundation, and individual donors
- Led six Regional Executive Directors on all philanthropic strategies, including corporate campaigns, donor relationships, metrics, CRM; **grew fundraising from start-up to \$2+ million** per region in less than two years.
- **Reduced expenses** by systematizing processes and systems for all back-office development operations; dramatically **improved operating efficiencies** and enhanced external transparency

LASTNAME PHILANTHROPIC ADVISING, Chicago, IL

2002–2007

Philanthropic Advisor

Provided strategic marketing, fundraising, and organizational consulting to diverse clients.

- **Generated \$75M+ in revenue** in five years to WellKnown Healthcare, WellKnown Environmental Group, the WellKnown Policy ThinkTank at **Princeton**, among others
- Outcomes include stronger client relationships, **increased donor retention, double-digit revenue growth**

JP MORGAN, Chicago, IL

1998–2002

Senior Vice President and Director, Internal Marketing/Media/Merger Communications

Led strategic marketing initiatives during period of significant corporate transition. Managed budget of \$5M, staff of 15 while implementing effective **corporate communications to 30,000 employees in 40 states**

- **Served on Executive Committee** for Mergers and Acquisitions, which successfully completed JP Morgan/WellKnown Bank merger-the largest in banking history at the time
- **Improved employee retention** by 25% within 18 months, saving the company millions in costs

PRINCETON UNIVERSITY, Cambridge, MA

1995–1998

Senior Director of University Campaign Projects, Office of University Development

Chief strategic revenue and donor relationship officer for University Provost, managing a team of seven

- **Achieved \$60M fundraising goal**, including goals for five presidential initiatives
- Selected for Presidential Campaign Planning Committee that **led successful \$2.1B campaign** for Harvard
- Led donor strategy and communications for University provost; **increased average gift** by 20% in year one
- **Promoted in just six months** from Associate Director to Senior Director

YALE UNIVERSITY, New York, New York

1990–1995

Principle Gifts Officer-Office of University President (1993–1995)

Major Gifts Officer-Office of Dean at Yale Business School (1990-1992)

Member of the University President's Principle Gifts team-strategically identified and solicited donors and alumni for University gifts for Yale's \$2 Billion Capital Campaign

- **Grew client base**, increased annual revenue, improved donor retention by 20% over two years
- Considered a "table-setter" – brought together all the key stakeholders, built consensus among faculty, Dean, Provost which **secured grants from top foundations**: Ford, Rockefeller, Carnegie, Gates, etc.
- **Recognized for performance** via major promotion to the Presidential fundraising staff

EDUCATION

YALE UNIVERSITY, New York, NY

Yale Business School- MBA, Marketing and Management

School of International Relations, (SIR) - International Business and Human Rights

BOSTON COLLEGE Bachelor of Arts (BA), Political Science and International Relations, Honors

OTHER: Proficient in French

Pudra Jimenez

email@gmail.com | www.linkedin.com/in/x | 917-917-9177

STRATEGIC MARKETING LEADER / INSURANCE EXECUTIVE

18+ year track record of driving consistent revenue growth, distribution expansion, customer retention and profitability in the insurance industry. Developed innovative marketing, sales, and service initiatives by leveraging deep knowledge of insurance lifecycle.

- *Strategic growth and innovation:* Delivered new marketing/segment/product strategies **creating \$500m in revenue**. Develop new business models and leverage insurtech/fintech to drive innovation.
- *Customer retention and profit improvement:* drove **\$400m in premium retention**, \$70m in profit.
- *Customer experience:* **Increased customer satisfaction 10%** and products per customer 10%.
- *Distribution channel expansion:* **Drove multi-channel expansion** beyond agents to include brokers, financial institutions, affinity, and digital direct channels, creating \$ 160m in revenue growth.
- *Digital Transformation:* Co-led \$110m transformation to a **data driven and digitally enabled** marketing and sales organization. Implement digital marketing and distribution platforms.
- *Team Leadership:* Built and managed teams of up to 200; saw **high retention of top performers**; known for staff development, including promotions.
- *Insurance Expertise:* Business development, underwriting, product, service, renewals, claims within Life, A&H, Personal Lines Commercial Property/Casualty insurance, and Employer Benefits.
- *Startup Experience:* **Founded marketing start up** that became a leading integrated marketing agency in India, with \$50m in sales and **50% annual growth rate**, 200 employees.

- | | | |
|--------------------------|-----------------------------|------------------------|
| ◆ Strategy Development | ◆ Distribution Development | ◆ Business Development |
| ◆ Digital Transformation | ◆ Data Analytics & Insights | ◆ Product Development |
| ◆ Customer Experience | ◆ Stakeholder Management | ◆ P & L Management |

***From performance reviews:** "thought leader...innovative...critical advocate of change...strategic mindset...collaborative by nature...develops strong relationships with leaders...focus on customer experience...Great business acumen"*

EXPERIENCE

WellKnownGlobal Insurance Inc.,

2010 – 2020

Vice President Marketing, International Insurance

Responsible for building marketing capabilities and developing new businesses via new customer segments and distribution channels. Built and led team of 16 direct reports, 200 total reports via matrix organization.

- Led development of bank, broker and affinity distribution channels **contributing more than \$120m**.
- Produced \$50m in new annual premium by **building digital platforms** to sell solutions direct to small businesses and individuals. Created programs that cross-sold P&C, personal lines, and individual life products to business owners and employees.
- Co-led 2-year \$90m **digital transformation** of customer and sales processes for all distribution channels, **improving agent productivity 25%** and creating new sales of \$20m in first year.
 - Enabled capability to sell remotely, maintaining sales during COVID -19.
 - Partnered with insurtechs and fintechs to **speed time to market** and transform processes.

- Grew team of one dozen to a dynamic 200+ global marketing and communications organization. Directed marketing spending and budgets. Led team in:
 - Establishing new capabilities in **integrated marketing**, research, advertising, content, PR, and events.
 - Creating brand identity, brand positioning and **increasing brand awareness by 15 %**.
- Created central hub for **data analytics**. Leveraged data models to drive customer acquisition, customer retention and underwriting risk, **increasing premiums by \$70m** and conversions 18%.
- Developed customer experience capabilities. **Increased customer satisfaction** 15%, products per customer 10%, resulting in \$ 180m in revenue and \$55m in process savings.
- **Designed partner ecosystem innovation strategy** which drove customer engagement. Constructed ecosystem of insurtech and business partners that delivered complete product and service solutions.

GlobalWellKnown Insurance

2002 – 2010

Vice President, 2007 – 2010 | Assistant Vice President, 2004 – 2007 | Marketing Manager 2002 – 2004

Led global strategic marketing initiatives that drove growth and profitability across commercial and consumer insurance. Spearheaded customer experience innovation, product development and new brands.

- Led **cross selling and retention** efforts for global property casualty insurance businesses:
 - **Produced \$190m** in new revenue.
 - Leveraged **data analytics** to reduce risk, improve profits and drive cross selling.
- Created customer growth and retention strategies in global personal lines, A&H, and life insurance businesses, **increasing sales \$180m** over 5 years.
- **Pioneered customer experience initiatives** to utilize customer insight to drive retention, cross/up selling and process improvement, resulting in \$110m in revenue/savings within 3 years.
- **Led international re-branding** and communications efforts for WellKnown international property and casualty business. Managed marketing and public relations agencies relationships.
- Pioneered US **multicultural customer marketing** initiative targeting Indian American and Hispanic life insurance markets. Recruited 400+ financial advisors resulting in new revenue of \$47m in first year.

BigRetail Inc.

2001 – 2002

Vice President

Led product development and manufacturing for wireless communications.

SmartCom Group, India

1992 – 2001

Founder and General Manager

Founded start up and led the company to be a **leading integrated marketing agency** in India, with \$50m in sales and **50% annual growth rate**. Expanded to a team of 200 and offices in India's 4 major markets.

BigMarCom Worldwide, Mumbai 1992 – 1996

Senior Account Manager, Account Manager, Account Executive

Progressed to lead client manager for \$50m of Indian and Pan-Asian client relationships including Microsoft, MasterCard, UPS, and Coke. Led business development efforts resulting in new sales of \$20mlion.

EDUCATION AND LANGUAGES

- Bachelor of Science, Business Administration - PrettyGood University
- Fluent Hindi and Spanish.

999 East 99th Street Apt #15D
New York, NY 99999

Susan Sanders
www.linkedin.com/in/szsanders

(999) – 999 - 9999
susan.sanders@gmail.com

FINANCE DIRECTOR

CFA Charterholder with 10+ years of progressively responsible experience in the media industry.

- Accounting
- Forecasting
- Financial Planning & Analysis
- Global Staff Leadership
- M&A
- Financial/Shareholder Reporting

◆ Viacom ◆ NBC-Universal ◆ McKinsey ◆ HarperCollins

- **Global experience** leading teams across the U.S., UK, Canada, Australia, New Zealand, and Asia
- Key role in Viacom division restructuring, supporting **profit growth from -10% to +15%**. Received **award for outstanding performance**.
- Developed global **strategic plan**, as key member of 5-person leadership team reporting into the CFO of HarperCollins International Division (\$400 million in revenues).
- **Reduced costs by as much as 25%** while protecting or enhancing revenue sources.
- Key role in dozens of **Mergers and Acquisitions**; Expertise in all facets of M&A.
- **Managed staffs of up to 7**; saw near zero turnover of highly productive professionals.

From [LinkedIn Recommendations & Reviews](#): "Exceptional leader and team player...thought leader...delivers a top notch work product...Consistently demonstrates strong technical, analytical and presentation skills"

PROFESSIONAL EXPERIENCE

ACTING VP OF FINANCE / CAO / CONSULTANT

June 2014-Present

Carman Health Analytics, New York, NY

(formerly Johnson Healthcare, a division of Dow Jones)

Serve in a variety of senior finance related roles. Assist the company in the post-sale period on various financial and accounting matters.

HARPERCOLLINS, INC., New York, NY

2011- 2014

Vice President -Finance

Responsible for the financial strategy, planning & analysis, accounting, financial reporting, compliance and working capital of HarperCollins' \$400M International and \$50M Consumer Magazines businesses.

Oversee a global staff of about 30 professionals.

- Led the fast-tracked sale process of a non-core media business leading to **\$20 million in revenue**.
 - Managed the divestiture of several unprofitable subsidiaries, as well as the unwinding of a UK joint venture and restructuring of the UK businesses, **adding over \$10 million** to the bottom line.
 - Led **cost cutting** initiatives across divisions, including outsourcing and restructuring incentive compensation, **improving gross margin by 10%**.
 - Overhauled **budgeting/forecasting** process for all subsidiaries, which significantly enhanced business channel reporting and metrics.
 - Developed **cash flow model** which improved the accuracy of working capital projections.
-

Leslie Kwan Lee

444-444-4444 | xxxxxxx@gmail.com | www.linkedin.com/in/X

VICE PRESIDENT – HUMAN RESOURCES

Strategic HR executive and trusted advisor to the c-level, including at the **largest independent school district** in Pennsylvania and a top performing **business school**; bring a data-driven approach to HR team leadership.

- **Increased retention by as much as 63%** for top performers, at every organization, via:
 - Transforming **organizational culture**
 - Crafting consistent, fair **HR policies and procedures**
 - Developing **employee relations training**
- Transformed approach to **performance management** and leadership development:
 - Developed **competency models**, where none existed previously,
 - Won a prestigious **award for diversity**, equity and inclusion (DEI)
- Created a national **award-winning leadership development program**
- **Improved recruiting** through new marketing channels and branding, e.g. increased web traffic by 40%
- **Led teams of up to 22 HR & benefits professionals**; known for staff development and mentoring
- Possess a **Doctor of Education (Ed.D.)** and an MS in Educational Administration

◆ Talent Acquisition & Development

◆ Workforce & Succession Planning

◆ Employee Relations

◆ Learning & Development

*From **LinkedIn Recommendations**: “trusted advisor...true business partner...thought leader and HR innovator...motivational...key member of our leadership team...a calm voice of reason in challenging situations”*

EXPERIENCE

VICE PRESIDENT, HUMAN RESOURCES

2015 – Present

WellKnown Pharmaceutical Company

Co-lead the entire HR function, reporting to the CHRO. Lead executive management and HR/Benefit team of 10 to develop and retain top talent while supporting the company's financial objectives

- Recognized for **transforming both HR and entire company culture**:
 - Changed perception of HR from “road-block” to “**strategic partner**”
 - **Improved communication** between HR managers and business unit leaders
 - Developed transparent and consistent **policies and procedures** for poor performers
- Led team in improving **retention of top performers by 50%+**; reduced turnover from 23% to 11%
 - Created process to identify **high-potentials**, as well as underperformers/poor managers
 - Improved **employee engagement** survey results by 17%, via employee engagement initiatives
 - Implemented **performance-management** training that improved the identification and rewarding of high performers as well as the exit of poor performers
- **Improved talent acquisition**; identified new acquisition channels and built strategic partnerships, meeting and exceeding all AA / EEO / OFCCP goals and regulations; **passed DOL audit**.

HR Director, Leadership Recruitment & Selection

2010 - 2015

PHILADELPHIA INDEPENDENT SCHOOL DISTRICT, PA

Created consistent, transparent processes to recruit and select 1,800 internal and external campus and central office leadership officers, resulting in 175 yearly hires with an **85% acceptance rate**

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EDUCATION AND LANGUAGES

- Bachelor of Science, Business Administration - PrettyGood University
- Fluent Hindi and Spanish.

RISK ANALYST / ASSOCIATE

MS in Financial Mathematics (Dec 2019) with a strong background in financial analysis and modeling and substantial leadership experience. Proven ability to successfully convert data into analytic insights that drives strategic decisions.

- **Client facing experience** via internships includes daily interactions with key accounts.
- **Built dozens of models** and forecasts, using SAS, R, C, MATLAB, Excel VBA/Macros, Python, R and more.
- **Won the X award (top 5%)** for model-optimizing portfolio
- Held two **financial analyst internships**, at **JP Morgan and Deloitte**
 - Credit Loss Modeling - CECL
 - Regression Methods
 - Financial Statement Analysis
 - Stress Testing – CCAR

EDUCATION

North Carolina State University, Raleigh, NC **December 2019**
Master of Science (MS), Financial Mathematics (GPA: 3.5)
Select Courses: Financial Risk Analysis, Options and Derivatives Pricing, Fixed Income Products, Monte Carlo Methods, Statistical Inference, Linear Algebra, Computational Experiments, Stochastic Calculus

X University, Beijing, China **May 2018**
Bachelor of Science (BS), Mathematics and Applied Mathematics (GPA: 3.5)
Select Courses: Game Theory, Financial & Managerial Accounting, Cost Accounting, Corporate Finance

ACADEMIC PROJECTS

Current Expected Credit Loss (CECL) and Comprehensive Capital Analysis and Review (CCAR) **Summer 2018**
Developed CCAR and CECL models that effectively forecasted credit loss: result – **strongly predictive, R^2 of .90**

- Downloaded and cleaned Fannie Mae Mortgage loans data. Developed model under current US GAAP and CECL to forecast Allowance for Loan and Lease Losses (ALLL) for mortgage loans.
- Performed linear regression, logistic regression, Markov Chain Loan-Level Transition Matrix, model back-testing.
- Created amortization schedule and implemented PSA loan prepayment model.

Elastic Asset Allocation Project, EXCEL **Autumn 2017**
Developed a dashboard to optimize a portfolio of ETFs with Elastic Asset Allocation Approach.

- Used EXCEL VBA and Macros.
- Result: **outperformed benchmark**.

Portfolio Optimization using Monte Carlo Simulation, Python, Matlab **Spring 2018**
Optimized a portfolio of stocks using Modern Portfolio Theory.

- **Succeeded in maximizing Sharpe ratio**; improved performance vs. benchmark.
- Used Modified Elastic Asset Allocation Model, computing a geometrically weighted score to generate optimal weights.

RELEVANT INTERNSHIP EXPERIENCE

JP Morgan, Raleigh, NC **Summer 2019**
Data Scientist – Internship
Identified \$1 million in potential new revenue via enhancing personal-loan risk-score model.

- Used logistic regression and machine learning skills; found better data sources.
- Authored and presented model performance report to customers every two weeks including Wells Fargo.

Deloitte, Mumbai, India **Summer 2017**
Risk Analyst – Internship

- Increased revenue by \$3 million via Pledge Repo module through adding price/cash flow ratio.
- Analyzed the corporate credit spread based on the historical loan performances and default risks.

ADDITIONAL INFORMATION

Bloomberg BMC Certificate **September 2018**
SAP University Alliance Certificate **May 2017**

EDUCATION

Bronx, NY Dec 201X

Fordham University Gabelli School of Business Major GPA 3.91 Cumulative 3.65 SAT 2020 GRE Math 800 Verbal 750
Major: Business Administration with dual concentration in Finance and Marketing Minor: Philosophy

WORK EXPERIENCES

Factory PR, New York Fashion Week S/S'13 Intern

New York, NY Summer 201X

- Supported all aspects of pre-show and event organization
- Assisted stylists and freelancers with various projects: photoshoots, model casting, styling and buying
- Coordinated with both backstage and front-of-house of six designer fashion shows during fashion week (Betsy Johnson, Concept Korea, Leila Shams, Asher Levine, Gilded Age and Gerlan Jeans)

UBS Advisors, Portfolio Management Intern

New York, NY Spring 201X

- Assisted a team of 17 investment and portfolio professionals over various projects at asset class or portfolio level
- Conducted market/equity research and funds due diligence
- Helped create pitch books and presentations for individual and institutional clients
- Analyzed M&A deals for risk arbitrage and managed various corporate platforms (eg. FI360) for new clients' holdings
- Built and developed relationships with over 200 prospects through phone calls, emails and mails

Michael Kors, Inc., Fabric and Trim Dept. Intern

New York, NY Fall 201X

- Managed and updated spreadsheets on supply chain, mainly the manufacturers from India and China; followed up with vendors on the latest shipments and samples; Performed quality control for the received samples
- Assisted the production team with various projects in a timely manner; Attended department meetings in discussion of market needs and trend analysis; Studied colors, fabrics, trims, garment constructions and the production process

AOL Inc., Trade Media Intern

New York, NY Spring 201X

- Coordinated with design and management of innovative business information tools projects across a wide range of subject areas
- Assisted in building AOL's trade media business in Ventures area through web/blog research of the finance/ventures industry
- Wrote copy and utilized social media to help build editorial content.

SMARTMONEY Investment Club, Founder/Analyst/Financial Advisor

New York, NY S/F/W 201X

Targeted and recruited under/grad students with strong interest in financial markets and investment

- Researched and studied different securities, collected financial data and analyzed/computed statistically
- Hosted investing seminars with major speakers and implemented strategies through weekly stock pitch
- Planned investment portfolios and hosted and performed virtual stock competition once a month via MarketWatch
- Advised students/clients on securities with different strategies (e.x. value/growth investing) in terms of risk tolerance

Angela Horton, Marketing/Sales Intern

New York, NY Fall 201X

- Organized meetings with clients to sell linens and bath amenities to hotels; Went on appointments to show the collection
- Called to follow up and followed through to ensure customer satisfaction and that we are delivering the service expected
- Worked with courier service from overseas to arrange for shipments to be imported from Asia and the agent in Hong Kong to arrange for smooth deliveries

LEADERSHIP EXPERIENCE AND EXTRA CURRICULUM

- **Sales Representative** of Esley Collection at NY Immediate Holiday/Resort 12-13 Fame Show
- **Senior Analyst** at *Smart Woman Securities*, Fordham Chapter 201X
- **The Winner Team** of Fordham MMS Marketing Simulation Competition 201X
- **Student Representative** at Harvard Business School "201X Asia Business Conference"
- **Selected School Representative and Participant** in meeting Warren Buffet in Omaha (3-day trip) 201X
- **Vice President** of Fordham Marketing Association 201X
- **Events Coordinator** of Fordham Entrepreneur Society 201X
- **Co-Founder** of Global China Connection at Fordham Chapter 201X
- **Chairman** of Awareness Community in Tierney 201X

SKILLS/INTERESTS

Fluent in English and Mandarin; Proficient in Word, Excel, Powerpoint, SPSS, Photoshop;
Knowledgeable in Bloomberg, R, Matlab, Visual Basic, Dreamweaver and Audition;
Interests: Traveling, Photography, Drawing, Ballet, Piano and Ping-Pong;

Susan Smith

New York, NY · 620-620-6200 · www.linkedin.com/in/X · ssmith@xxxx.com

FINANCIAL ANALYST

- Strong Academic Record ▪ Client Relationships ▪ Leadership ▪ Global Perspective
- **Currently intern as a business analyst** for a boutique consulting firm.
- **Experience analyzing M&A**, sales and marketing trends, and recommending client solutions.
- **Speak five languages**; Global perspective includes working with international business (China, India).

EDUCATION

NYU Stern School of Business (May 201X)

Major: **Business Administration** with dual concentrations in **Finance and Marketing** Minor: Philosophy
Major GPA 3.91 Cumulative 3.65

ACHIEVEMENTS

- **Placed 5th out of 200** in the MarketWatch TCFA-Investment Contest: achieved 102% return in 6 months
- **1st place out of 12 teams** in Fordham Marketing Contest: Gained 34% market share for computer firm
- **One of three selected, out of 100**, by the Smart Women Securities initiative to meet Warren Buffet

WORK EXPERIENCE

Pulse Advisory, *Business Analyst/Intern*

Mar 201X – Present

Boutique consulting firm advising startup/high-growth companies in Tech, Media and Telecommunications.

Supported consultants with developing and implementing client strategies, and facilitating presentations.

- In first two weeks, developed direct marketing strategy for a Tech startup; Awarded responsibility for rollout.

Factory PR, New York Fashion Week Spring/Summer'13 *Intern*

Jul-Oct 201X

Managed sales relationship with Macy's and Bloomingdales. Communicated with more than 60 buyers, press/bloggers.

UBS, *Portfolio Management Intern*

Feb-May 201X

- Conducted equity research and due diligence on over 50 funds. Created pitch books and presentations for individual and institutional client meetings
- Analyzed M&A deals - identifying three risk arbitrage opportunities that were acted upon by the firm
- Built relationships with 200+ prospective clients (mainly high-net-worth individuals) through phone calls and emails

Michael Kors, Inc., Fabric and Trim Dept. *Intern*

Sep-Dec 201X

Analyzed sales and market trends. Built supply-chain relationships with Indian and Chinese manufacturers (leveraged fluency in Mandarin); Negotiated lower production costs with three vendors.

AOL Inc., Trade Media *Intern*

Feb-May 201X

Conducted research on the finance and venture capital industry to support AOL's trade media business development. Wrote copy for AOL's web-platforms, as well as Facebook, Twitter, and Tumblr.

Merrill Lynch, Wealth Management *Intern*

Oct-Dec 201X

Assisted VP with business development; made well-received investment recommendations via own initiative to learn client needs.

SKILLS

- **Languages:** Fluent in English, Mandarin, Shanghainese, Cantonese and Korean
- **Technical:** Proficient in Microsoft Office, SPSS, Prezi, Bloomberg, R, Matlab, and Visual Basic

OTHER LEADERSHIP EXPERIENCE

- **Analyst** at *NYU Student Managed Investment Fund* (\$1 Million Assets Under Management) 201X
- **Senior Analyst** at *Smart Woman Securities*, Fordham Chapter 201X
- **Student Delegate** at Harvard Business School “*2011 Asia Business Conference*”
- **Vice President** of *NYUMarketing Association* 2010
- **Founder and Business Analyst** of *Intelligent Investor Investment Club* 201X
- **Co-Founder** of *Global China Connection* at Fordham Chapter 201X

INTERESTS: Ran three marathons; lived in France for a total of one year