

Amit Patel

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EDUCATION

University of Massachusetts Amherst
Isenberg School of Management

Amherst, MA

Bachelor of Business Administration in Finance / Financial Analyst Concentration

Candidate May 20XX

- Cumulative GPA: 3.89; Recipient of the Stephen and Sandra Levy Scholarship

EXPERIENCE

Bertucci's Italian Restaurant

Watertown, MA

Host | Server

April 20XX – Present

- Manage seating and waitlists for 150+ guests and coordinate 50+ daily call-in/online orders using Micros (Oracle), reducing wait times by 25% during peak hours and maintaining over 95% accuracy across all orders
- Process various payment types including cash, credit, gift cards, and split checks for 100+ tables weekly, efficiently completing transactions while reconciling \$2,000+ cash drawer daily
- Communicate across front- and back-of-house teams in fast-paced and high volume environment to ensure timely food delivery, accurate orders, and optimized side job completion to increase table turnover times each shift

The Davis Financial Group

Hadley, MA

Research Analyst (Remote)

May 20XX – August 20XX

- Collaborated with cross-functional team of 5 financial advisors and portfolio managers to gain insight into practical applications of alternative investments, contributing to investment strategy discussions for portfolios of \$15M+ in assets
- Analyzed performance across ~25 alternative investments (private equity, hedge funds, real estate, and commodities) to evaluate impact of incorporating liquid alternative investments into retirement portfolios
- Utilized Excel Solver and advanced statistical and modeling techniques (mean-variance optimization, Monte Carlo simulations) to optimize portfolio allocations, achieving highest possible Sharpe ratio and improving returns 15% on average

EXTRACURRICULAR EXPERIENCE

UMass Investment Banking Club (UIBC)

Amherst, MA

Analyst | General Member

September 20XX – Present

- Maintain weekly one-on-one mentoring schedule and collaborate with club leadership to organize and present topics such as accounting and valuation to ~50 general members at bi-weekly meetings
- Developed financial forecasts by referencing McDonald's Corp SEC filings to create three-statement and DCF models
- Created 20+ page mock CIM for Shake Shack by analyzing over 100 public financial reports and earnings call transcripts
- Synthesized and visualized financial data using Excel and PowerBI, pitching and defending findings for a potential M&A deal between Shake Shack and Wendy's

JPMorgan

Investment Banking Virtual Program Participant

October 20XX

- Conducted detailed company and industry analysis for potential M&A deal by reviewing financial statements, market trends, and competitive positioning, developing insights to inform strategic fit
- Performed a valuation of target company using discounted cash flow (DCF), precedent transaction, and comparable company analysis, applying Excel-based models to determine value based on industry benchmarks
- Created mock pitch presentation summarizing investment rationale, valuation, and deal structure, developing essential communication skills critical for client-facing investment banking roles

Isenberg Investment Club

Amherst, MA

Active Member

September 20XX – May 20XX

- Provided financial forecasting for companies and industries, discussed market events, and created discounted cash flow (DCF) models to inform investment decisions
- Developed technical skills through company-specific modeling and participation in a stock pitch competition

SKILLS & INTEREST

Technical Skills: Microsoft Word, PowerPoint, Excel (Intermediate), Access, Outlook, PowerBI, Tableau, Micros (Oracle), AI

Certifications: Isenberg's Excel Advanced User Badge, Bloomberg Market Concepts (BMC), DataCamp: AI Business Fundamentals, LinkedIn: Copilot in Excel: AI-Powered Financial Planning & Analysis Certificate

Languages: Hindi (Native)

Interests: Cricket, Indian Super League, MLS, Chess, Bollywood, Mediterranean cuisine, international travel, origami