

Suzanna Perez

(978) 234-5678 | sperez@umass.edu | [linkedin.com/in/suzperez/](https://www.linkedin.com/in/suzperez/)

EDUCATION

University of Massachusetts Amherst

Amherst, MA

Isenberg School of Management

Bachelor of Business Administration in Finance

Candidate, May 20XX

- **GPA:** 3.98/4.0; **SAT:** 2010
- Commonwealth Honors College; Senior Thesis Topic: *Impact of 2008 Financial Crisis*

Relevant Coursework: *Financial Modeling, Financial Risk Management, Advanced Investments, Capital Markets & Institutions*

EXPERIENCE

HarborVest Partners

Boston, MA

Investment Banking Internship

May - August 20XX

- Executed financial analysis, due diligence, and valuation modeling for M&A transactions, contributing to the successful facilitation of deals valued up to \$250 million
- Prepared detailed pitch books and presentations for potential clients, incorporating industry research, financial analysis, and market trends to drive client engagement and pitch conversions
- Contributed to the origination and execution of equity and debt offerings, participating in the preparation of offering memoranda, investor presentations, and data rooms, facilitating efficient capital raising processes
- Conducted comprehensive research and analysis on industry sectors and companies, generated detailed reports, and presented findings to senior team members, influencing investment decision-making processes
- Collaborated with cross-functional teams to gather and analyze financial data, perform company valuations, and create financial models using Excel, ensuring accurate and reliable financial information for investment recommendations
- Advanced ability to conduct extensive due diligence and synthesize complex information by researching target companies, analyzing financial statements, and preparing reports to identify potential risks and opportunities

Salem Five Bank

Salem, MA

Internal Audit Intern

May - August 20XX

- Conducted extensive General Ledger Reconciliation for Bank and its subsidiaries, including Accounting, Insurance, Investment Corps, Insurance Services, and Insurance Holdings companies
- Performed thorough Wire Transaction testing and investigation, identifying and recommending solutions for issues identified during the audit
- Contributed to successful Retail Admin Audit by demonstrating strong organizational, communication, and problem-solving abilities to effectively complete audit tasks and support team

Heritage Club Golf Course

Charlton, MA

Grounds Crew

April 20XX – August 20XX

- Supported department managers in specialized irrigation projects by working overtime on top of 9-hour workdays
- Collaborated with 18 course crew members and the Superintendent to optimize team efficiency and course quality
- Cultivated self-discipline and time management skills by arriving to the course before 5:15 AM each day

LEADERSHIP & EXTRACURRICULAR EXPERIENCE

UMass Investment Banking Club (UIBC)

Amherst, MA

Analyst

September 20XX - Present

- Selected for the UIBC Analyst Program; receive weekly one-on-one mentoring from leadership team
- Developed financial forecasts by referencing Nike SEC filings to create a three-statement and DCF model
- Pitched a potential M&A deal between Shake Shack and McDonald's to leadership and defended findings
- Present foundational technical topics, such as accounting and valuation, to general members in bi-weekly meetings

Isenberg Investment Club

Amherst, MA

Member

September 20XX - May 20XX

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

SKILLS & INTERESTS

Computer: Word, PowerPoint, Access, & Outlook; Python, SQL (Basic)

Certifications & Training: Isenberg's Excel Advanced User Badge; LinkedIn Learning Course: *Financial Modeling Foundations*

Interests: Electronic Music Composition, Avid Skier, European Traveler (Italy, Greece, Germany, Scotland)