

EXPERIENCE

CHICAGO VENTURE PARTNERS, Austin, TX **2022 – Present**

Family office investing in public companies via structured debt and equity instruments.

Investment Associate (2022 – Present)

- Compile monthly investment reports from large data sets to identify effectiveness of present strategies.
- Highlight key trends and patterns for the investment team to form new strategies or alter current ones.
- Evaluate investment prospects, compute returns, and craft term sheets aligned with our investment approach.
- Manage a direct report who begins the firm's outreach efforts.
- Foster relationships with potential partners from initial calls to the closing of the transaction.
- Build automations within company processes using Python, JavaScript, and other languages.

Research Manager (2022)

- Presented PowerPoint presentations to the investment team after in-depth due diligence and financial analyses.
- Developed theses from research and made investment recommendations to the executive team.

LIVE OAK PUBLIC FINANCE, Austin, TX **2021 – 2022**

Municipal advisory firm working with over 100 municipalities in the state of Texas.

Analyst

- Built financial models to determine potential structures to fit various tax rate situations.
- Constructed presentations for municipal clients to convey financing possibilities.
- Passed the MSRB Series 50 exam to become a municipal advisor.

SMARTBIZ LOANS, Austin, TX **2019 – 2021**

Financial technology company specializing in Small Business Administration (SBA) loans.

Relationship Manager

- Created BI reports and identified patterns from internal credit data and presented results to management.
- Conducted analyses of thousands of loans to evaluate financial and credit risk.
- Completed over 300 transactions totaling more than \$50 million.

CHICAGO VENTURE PARTNERS, Chicago, IL **2018 – 2019**

Analyst

- Managed the initial due diligence of publicly traded companies.
- Built models within Excel & Google Sheets related to SEC compliance and financial recordkeeping.

EDUCATION

THE UNIVERSITY OF TEXAS AT AUSTIN, McCombs School of Business, Austin, TX **May 2023**

Master of Business Administration

THE UNIVERSITY OF TEXAS AT AUSTIN, College of Liberal Arts, Austin, TX **May 2017**

Bachelor of Arts in Economics | Minor in Mathematics

ADDITIONAL

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- Computer Software: Microsoft Excel, PowerPoint, Word, Power BI, Salesforce and Tableau.
 - Computer Languages: JavaScript, Python, SQL, and Visual Basic.
 - Languages: English (Fluent); French (Intermediate).
 - Personal Interests: Cooking, Playing Guitar/Bass/Saxophone, Reading, Skiing, and Writing.
 - Work Eligibility: Eligible to work in the United States with no restrictions.