**NAME, CFA**

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**CORPORATE FINANCE & STRATEGY🞍 MERGERS & ACQUISITIONS 🞍 HEALTHCARE**

Accomplished finance professional with 8 years in investing and corporate finance. Extensive experience in early stage financing transactions, corporate mergers and acquisitions, investment research, corporate financial reporting, and value focused healthcare consulting. A results driven leader that cultivates talent through a growth mindset. ***MBA Degree; CFA Charter holder.*** Areas of expertise include:

* Business Valuation
* Strategy Development
* Transaction Due Diligence
* Mergers & Acquisitions
* Cash Flow Analysis
* Investment Research & Analysis
* Capital IQ & Bloomberg Research
* Advanced Excel Model Development & Analysis
* Tableau Statistical Analysis & Reporting
* Financial ROI Analysis & Reporting

**PROFESIONAL EXPERIENCE**

**HEALTHCARE DATA COMPANY,** City, ST **Year - Year**

*Founded in 20xx, Healthcare Data is a healthcare data company, which has grown from a start-up into a division of XYZ Business Solutions. It tracks cost and outcomes data for x type surgeries for national hospital systems.*

***Director of Finance, 2013 – Present***

Charged with managing all financial analysis and reporting for the company and its national client base. Advise executive team on financial structure and fundraising; advise clients on ROI opportunities.

* Advised company’s management team on how to respond to an unsolicited corporate acquisition offer by performing all internal valuation projects. This resulted in a 10% increase in the company’s valuation by highlighting the effect of company’s improving risk profile using a discounted cash flow model.
* Managed company’s client reporting team, reducing the time to produce reports by 75%; led a team of four analysts in developing new reporting models to create client specific reports based on company’s large data set. Additionally implemented Tableau as a new reporting platform for the team, which improved the accuracy and scalability of the reporting process during a period of large growth for the company.
* Executed the closing of a corporate merger by finalizing the company valuation and working with the legal teams for both companies to produce deal documentation and financial schedules for investors. Also led all financial due diligence by working with the acquisition team and company’s accounting team to provide detailed insights into the company and its operations.
* Implemented the financial transition of company into a large public company with a multi-billion dollar market cap. Creating new budgeting and reporting processes by working with the acquiring company’s finance team and company’s management team on how best to integrate these changes operationally with company’s culture.
* Executed and assessed all client ROI consulting projects, including contract negotiations with implant vendors and outlier identification projects that represented savings opportunities over $1 million dollars in multiple markets; while also incorporating outcomes measures that allowed our clients to implement these cost reductions without reducing quality.
* Executed valuation, P&L, and budgeting projects for the company by developing advanced financial models, working with the management team to establish the company’s outlook, and supervising the company’s external accounting team to deliver reports on the company to investors and the board of directors.
* Implemented an At-Risk Pricing contract by engaging the client’s management team and key physician’s to get buy in for company’s cost cutting strategies; creating a new revenue stream for the company that was aligned with our client’s success.
* Directed a company wide data reclassification project by successfully adapting company’s core classification system across 100,000+ items. Improving the company’s data quality and while also developing employee skill sets in managing large data sets and attention to detail.

***Financial and Operations Strategy Consultant, 2012 – 2013***

Served as a consultant for a portfolio company, advising the executive team on fundraising and budgeting efforts; also worked with clients to understand potential ROI and process improvement opportunities.

* Consulted on Series B fundraising; working with the CEO and COO to evaluate the strategic benefits of offers and developing valuation models and pro-forma financials, which drove the company’s valuation and investor decision making.
* Valued the profit potential of an At-Risk Pricing contract by modeling the size and risk profile of potential revenue for Company; while also balancing projected costs associated with the client.
* Developed and implemented a ROI Calculator used to highlight the value that company would bring to potential client hospitals, providing executives at the hospitals the information they need to obtain approval for products.
* Redesigned patient information collection process and developed a new strategic plan to increase adoption of the healthcare start-up’s implant registry product.

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**ABC, LLC.,** City, ST **Year - Year**

***Investment Analyst Intern, Healthcare Innovation Fund***

* Analyzed target companies for potential investment utilizing meetings with company management, industry trend information, comparable transaction analysis, valuation models and cash flow scenario analysis.
* Researched target’s comparable companies and competitors, comparable transactions, and industry trends using Capital IQ and third party research reports to provide the investment partners with a detailed analysis of potential transactions.
* Developed cash flow and valuation models used to evaluate investment opportunities in early stage health care firms on the right side of change in the health care industry for a strategic venture capital fund.

**LARGE CORPORATION,** City, ST **Year - Year**

*Tagline for company.*

***Senior Associate, Year - Year***

Promoted and charged with assisting portfolio managers with managing short-term fixed income funds and executing trading decisions based on cash flow analysis and investment research

* Managed the development of solutions to improve the investment and trading process by constructing models to streamline a new cash availability platform used to invest over $100 billion daily and models used in trading over $80 billion of Tri-Party Repurchase Agreements daily.
* Participated in Federal Reserve meetings on how to implement new mandates regarding Tri-Party Repurchase Agreements and created new processes for our team to comply with those mandates.

***Associate, Year - Year***

* Researched fixed income security quality using Bloomberg and other financial research tools to ensure they fulfilled investment requirements based on each client’s portfolio risk profile.
* Analyzed the cash and security availability for the Cash Management Team by creating portfolio holdings reports and providing the Investment Managers real time cash availability, which drove their investment decisions.

***Portfolio Accountant, Year - Year***

Performed daily cash projections and cash flow analysis for the International Finance Corporation’s institutional liquid asset portfolio

* Earned the *Above & Beyond* award for exceptional contributions and commitment to high standards of service
* Developed advanced financial models to service our client’s inflation indexed interest rate swap contracts
* Generated advanced Microsoft Excel worksheets and VBA macros to streamline daily procedures and minimize operational risk in daily and monthly NAV reporting.

**EDUCATION AND PROFESIONAL DESIGNATION**

**VANDERBILT UNIVERSITY OWEN GRADUATE SCHOOL OF MANAGEMENT,** Nashville, TN **Year**

Master of Business Administration

Concentration: Finance and Strategy

* President of the xx Club

**GREAT UNIVERSITY,** City, ST **Year**

Bachelor of Arts

Major: Mathematics

**CFA INSTITUTE**, City, ST

CFA Charter **Year**