

PROFESSIONAL EXPERIENCE

Corner Capital

Santa Barbara, California

Investment Banking Senior Associate – *Retail/Energy Group*

August 2013 – Present

- In-depth focus in the retail and oil and gas industry (Downstream and Midstream Sectors).
- Conducted due diligence meetings, summaries, and the collections/organization process.
- Responsible for managing clients and investors for debt and M&A transactions (both buy-side and sell-side) for companies throughout the United States.
- Managed the marketing and building of industry specific CIMs and other deal related marketing material.
- Responsible for managing a team of 4 junior employees in financial analytics, technical writing and industry research.
- Developed financial models, perform industry-focused valuation analyses (DCF, Company Comparables, and Real Estate valuation), and developed projections and proforma financials analysis.
- Experience sourcing clients, pitching new clients, presenting to company management teams and board of directors, and creating firm presentations material.

Mosaic Capital

Los Angeles, California

Investment Banking Analyst - *Generalist*

September 2011 – June 2013

- Creation of business development strategies and sourcing clients throughout South East Asia, China, and North America.
- Marketing of transactions raising equity and/or debt and M&A transactions.
- Supervising two to three junior staff members in creating marketing material, performing due diligence, analyzing historical financials and marketing transactions.
- Experience working in a variety of industries including telecommunications, manufacturing, green technology, oil and gas services, aerospace, retail, healthcare and mining.
- Development and participation in client presentations and building business relationships with clients.
- Built financial models for Mezzanine, Equity and M&A transactions.
- Organizing due diligence materials and building CIMs for use in marketing transactions to Debt and Equity Funds.
- Creating DCF, LBO, and Comparable Company valuation analyses.

SELECTED TRANSACTIONS

Sell-Side - \$115MM - Texas - Fuel Transporters and Retailers

- Completed the valuation with 3 scenarios (DCF, Comps, and a Bifurcated Real Estate/Multiple Valuation).
- Led the “full cycle” of the sell-side transaction and management of 4 junior employees in the creation of marketing material for a company with 3 separate business segments.

Capital Raise - \$17MM - Montana - Fuel Retailers

- Successfully led the capital raising process from an industry downstream specialty debt fund.

Capital Raise - \$40MM - Oklahoma - Fuel Transporters and Retailers

- Managed the creation of marketing material (CIM and No-Name Summary) and led the marketing and closing process.

EDUCATION

Portland State University

Post Baccalaureate, Economics

Portland, Oregon

September 2010 – May 2011

California State University Channel Islands

Bachelor of Arts, Psychology

Camarillo, California

September 2006 – May 2008

Universitat de Barcelona

Spanish Language and Cultural Studies

Barcelona, Spain

January 2006 – June 2006

LICENSES & TECHNICAL SKILLS

Financial Industry Regulatory Authority Licenses - *Series 79 & Series 63*

Skills - Advanced knowledge of Microsoft Office (Excel, PowerPoint, and Word), Capital IQ, and Bloomberg.

AWARDS & ACTIVITIES

Presidential Award for Community Service, *Award Recipient*

- Participated in organized yearly trips to Mexico to build new homes in rural towns during 1997-2003.

Hobbies

- Latin Dancing, Cycling, Hiking, Running, and Reading (Global and Financial News)