

John Smith

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Summary

Progressive Investment Banking experience with emphasis on strategic planning, best investment practices & procedures for market & investment analysis, real estate financing & appraisal.

EDUCATION

University of Georgia

BS Finance with Minor in Economics - GPA: 3.69

Aug '00 – May '14

EXPERIENCE

Barclays Bank, Investment Banking Associate

Atlanta, GA

May '18-Present

- Assist in Partnerships' Proprietary Capital. Sourcing potential investors and institution to raise capital for the Korean to increase Barclays real estate assets throughout Korea.
- Educate prospective clients in the fundamental concepts, practices, and procedures of commercial real estate finance, including market analysis, investment analysis, appraisal, etc.
- Provide financial evaluation, analysis, modeling, and structuring for income producing properties, e.g., office, retail, hotel, with emphasis on multi-family housing investments.
- Assist team in day-to-day responsibilities, including preparation of prospectus & offering materials, transactional support, and negotiations.
- Prepares forecasts and analyzes of trends in industry conditions, commercial real estate finance, and general business. Communicate with clients, equity investors, and lenders to execute financing negotiations and document preparations.

Oracle, Banking, Financial Analyst Intern

Atlanta, GA

Dec '16 – May '18

- Execute background checks on current clients and cold call potential clients interested in municipal or junk bonds.
- Train to be a bond trader & broker in Bloomberg system on trading requirements for different types of bonds, maturity, and rates.
- Based upon a bond's current and predicted strengths, research & assess various bonds' performance to recommend buy/sell strategy.
- Support Oracle in administrative tasks, including organizing conference calls meetings, preparing & formatting Excel spreadsheets, PowerPoint presentations, etc.

Infor, Financial Analyst Intern

Atlanta, GA

May '15 - Sept '16

- Analyze & audit database sales and transactions to ensure seamless migration to new SPRING database.
- Build revenue reporting & insight mechanisms, performance indicators, and tools to drive incremental revenue within SPRING dashboard.
- Prepare presentations of data findings, cost analysis, and revenue of financial reports, Assisted with audit reporting and invoice & management analysis.
- Assist in finance team's analysis and recommendations with PowerPoint presentations for improving company operations and business meetings.

SKILLS

Tableau, R, STATA, Microsoft Excel, Bloomberg Terminal, Python, Financial Analysis Soft Skills: Problem-solving, research, analysis, time management, client management, interpersonal communication, data entry, Capital Markets, Cryptocurrency, team player.

CERTIFICATIONS

Chartered Financial Analyst Level 1 CFA Institute 2019

Fields of Interest

Analysis, Capital Markets, Cryptocurrency