

**Chartered Financial Analyst (CFA) ■ Level II Candidate**

Intellectually astute Equity Analyst with strong analytical/finance acumen and outstanding modeling skills, which include ability to understand and amend complex data models. Recognized for taking lead role in evaluation, due-diligence, and recommendation of potential investments as demonstrated by top-picks implemented having generated average 25.6%. **Expertise & Applied Knowledge Includes:**

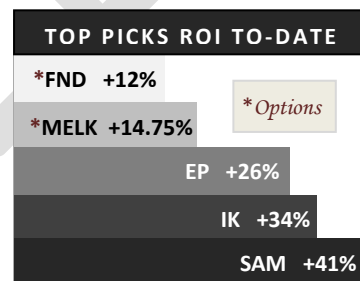
**Valuation & Fundamental – Analysis ■ Investment Strategy Origination ■ Financial Modeling Research/Due-Diligence ■ Risk – Determination & Recommended Mitigation Tactics ■ Team Leadership Financial Statements – Interpretation & Evaluation ■ Relationship Maintenance & Enhancement Marketing Materials & Analytical Reports – Preparation/Presentation ■ Efficiency Improvement Equities ■ Options ■ Alternative Investments ■ (Real Estate & REITs)**

**EXPERIENCE**

**EQUITY ANALYST ■ 06/2011 ▶ Present ■■■ ALPHA FINANCIAL GROUP – Location**

*Administer research within global equity markets, formulate reports on current and prospective holding, monitor implemented targets, and keep Investment Advisory Group and Broker/Dealer Team informed of crucial issues.*

- Generate/research investment ideas for client portfolios and execute due diligence on current positions.
- Produce valuation analysis, industry research, and company-specific fundamental analysis.
- Formulate investment strategy and ideology for long/short equity hedge fund.
- Direct, train, and mentor equity research team.
- ✓ **85% +/- of all recommended investments have been implemented.**
- ✓ Assisted in managing Alpha Capital Management, LLC investment account that, to date, yields a 7.64% annualized return.
- ✓ Designed firm’s first equity investment process, philosophy, and model.
- ✓ Drafted corporate operating agreement and developed marketing materials to support establishment of long/short equity hedge fund.
- ✓ Instrumental in reducing Investment Advisors’ stock selection process time by 50%, having contributed to development of proprietary financial model designed to determine risk levels and produce price targets.
- ✓ Integrated all attainable/relevant research to produce a single time-saving document utilized for dissemination by Investment Advisors.
- ✓ Partnered with oil/gas affiliate in generating an after-tax cash flow model that improved ROI accuracy by 15%.



**CORRESPONDENT SUPPORT ANALYST ■ 06/2006 ▶ 11/2010 ■■■ HERITAGE FINANCIAL – Location**

*Identified, resolved, and turned around all major operational issues for correspondents prior to escalating to management or other departments. Researched and settled database issues related to data integrity and reporting.*

- Managed risk analysis that included prospectus of short sales in cash positions, monitoring of negative equity reports, verifying option strategies, and reviewing accounts with margin equity below 20%.
- Cooperated with compliance in conducting internal and external FINRA/SEC audits.
- ✓ Enhanced efficiency of numerous firms’ reports, which remain in use for more than 500,000 accounts.
- ✓ Detected and corrected \$600 million error in daily client equity report for “Think Tank” by manually recalculating P&I payments on CDOs, futures pricing, currency conversions, and option contracts.
- ✓ Selected by Executive Management to pilot tailoring of assessment of historical REG-T margin calls above \$1 million that facilitated a 30% decrease in client defaults and violations.

EDUCATION	TECHNOLOGY PROFICIENCIES	MEMBERSHIPS
<b>Bachelor of Science (BS) – 2005</b> <b>Economics/Financial Applications</b> <b>Fordham University</b> <i>Bronx, NY</i>	Adobe Acrobat ■ Salesforce Store QM ■ Sunguard (Phase III) Regal Pro Trading Platform Omni Trading Platform Microsoft Excel/PowerPoint/Access/Word/SQL	<b>The Membership Club Est. 1928</b> Board Member (2013) President (2012) Social Chairman (2010/2011) <i>*Helped raise \$23,000+ for Children’s Medical Center &amp; Every Street Charity</i> Park Conservancy (2012 ▶ Present)