

# Edwin Navarro

Associate, Business Services M&A

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123 Main St, San Francisco, CA 94105

## STRENGTHS

- Analytical Thinker**  
Transformed complex data into useful insights, guiding strategy discussions that drove business improvement.
- Effective Communicator**  
Built relationships with clients ensuring transparency; peers often sought support for directing queries.
- Proactive Learner**  
Consistently pursued opportunities for skill enhancements, contributing to improved team performance.
- Team Contributor**  
Fostered collaborative efforts within projects, leading to smoother workflows and higher task success rates.
- Innovative Problem Solver**  
Addressed challenges with creative solutions that benefitted project outcomes without disrupting flow.

## SKILLS

Financial Analysis

M&A Transactions

Valuation Techniques

Industry Research

Data Interpretation

Financial Reporting

Market Analysis

Client Relationship Management

Due Diligence Processes

Presentation Skills

Negotiation Strategies Mentorship

Cross-functional Collaboration

Communication Skills

## SUMMARY

Dynamic and results-oriented professional with 4 years of M&A experience in financial services. Expertise in financial valuations, industry analysis, and fostering relationships with clients. Proven ability to thrive in fast-paced environments while maintaining a detail-oriented focus. Skilled in preparing high-quality presentations and conducting thorough due diligence processes. Excited to contribute to the growth strategies at Global Capital Advisors and enhance franchise value through impactful initiatives.

## EXPERIENCE

### M&A Associate

Capital Growth Partners 📅 June 2023 - Present 📍 Los Angeles, CA

Currently driving financial analyses and valuations for M&A transactions within the financial services sector. Engaged with senior bankers and managed client interactions to ensure effective communication and presentation outcomes.

- Conducted detailed financial assessments on various merger targets, influencing key investment decisions.
- Collaborated with teams to create compelling information memoranda tailored for executive clientele.
- Identified potential acquisition leads through extensive market research, effectively increasing viable options.
- Streamlined due diligence processes, enhancing evaluation accuracy and compliance adherence during transactions.
- Participated actively in negotiations with clients, proving instrumental in finalizing several successful deals.
- Mentored junior analysts, instilling confidence and knowledge across the team.

### M&A Analyst

Equity Advisory Services 📅 May 2021 - May 2023 📍 San Diego, CA

Contributed significant analytical support for valuation reports and strategic insights guiding firm recommendations at equity advisory services.

- Conducted comprehensive market analyses that aided C-level executives in decision-making.
- Established productive conversations with potential buyers, leading to flourishing business connections.
- Created presentations that elevated client engagement levels and promoted brand reputation in meetings.
- Guided management teams by delivering valuable insights into emerging market trends, actionable for execution.
- Facilitated cross-departmental collaborations that align strategic objectives, improving efficiency.
- Developed onboarding materials assisting new hires integrating seamlessly into the firm culture.

### Financial Analyst Intern

Strategic Investment Group 📅 June 2020 - August 2020 📍 Remote

Internship focused on supporting senior analysts regarding investments through research and data-driven insights, laying foundations for robust financial reporting.

- Aided in constructing pitch books that significantly enhanced clarity and impact for client deliveries.
- Undertook market studies reflecting industry trends which contributed to evaluated investment opportunities.
- Analyzed financial health indicators of firms supporting holistic investment assessment.
- Engaged in regular brainstorming sessions to discuss project strategies enhancing the thought leadership output.
- Created user-friendly Excel models optimizing forecasting for better data reliability.

Decision-making

Stakeholder Engagement

## LANGUAGES

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English Native

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Spanish Proficient

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## MY CAREER

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● M&A Associate at Capital Growth Partners (3.1 Years)

● M&A Analyst at Equity Advisory Services (2 Years)

● Financial Analyst Intern at Strategic Investment Group (2 Months)

- Gained initial exposure to M&A best practices facilitating comfortable transition to professional engagements.

## LEADERSHIP & AWARDS

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- Honorary Academic Scholarship Recipient
- Outstanding Achievement in Finance Award

## EDUCATION

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### Bachelor's Degree in Finance

University of Southern California 🎓 GPA: 3.8 📅 2026 📍 Los Angeles, CA

**Coursework:** *Investment Management, Financial Analysis, Corporate Finance, Valuation Techniques*

## CERTIFICATIONS

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- Certified Financial Analyst (CFA) Level 1 📅 2026
- Financial Risk Manager (FRM) 📅 2026

## TECHNICAL SKILLS

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- **Financial Software:** Excel, Bloomberg Terminal, QuickBooks
- **Data Visualization Tools:** Tableau, Power BI, Google Data Studio
- **Market Research Platforms:** Statista, IBISWorld, PitchBook
- **Project Management Tools:** Asana, Trello, Microsoft Project
- **Presentation Software:** PowerPoint, Canva, Keynote
- **Communication Tools:** Slack, Teams, Zoom
- **Collaboration Tools:** SharePoint, Confluence, Google Workspace
- **Financial Modelling:** DCF, Comps, Precedent Transactions
- **Stock Market Analyzers:** Morningstar, Yahoo Finance, Seeking Alpha
- **Accounting Standards:** GAAP, IFRS, FASB

## PROFESSIONAL AFFILIATIONS

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- Member, Finance Society at USC
- Volunteer, Local Financial Literacy Initiative

## ADDITIONAL INFORMATION

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**Work Status** : Authorized to work in United States. No sponsorship required.

## REFERENCES

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AVAILABLE ON REQUEST