



# Karter Becker

Associate, Investment Banking

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## STRENGTHS

- Analytical Acumen**  
Transformed complex financial data into clear insights that drove better business decisions.
- Communication Skills**  
Effectively communicated financial concepts during client engagements, earning praise for clarity and precision.
- Team Collaboration**  
Worked seamlessly with cross-functional teams, often becoming the go-to resource for financially-related queries.
- Problem Solving**  
Identified and alleviated compliance challenges promptly, resulting in smoother operational workflows.
- Client-Focused Approach**  
Cultivated lasting relationships through timely updates and proactive solutions for all client needs.

## SKILLS

Financial Modeling Credit Analysis

Portfolio Management

Regulatory Compliance

Client Relationship Management

Market Research

Risk Management

Data Visualization

Report Preparation

Financial Reporting

Project Coordination

Analytical Software Trend Analysis

Presentation Skills

Process Improvement

## SUMMARY

Finance professional with over 4 years of experience in investment banking and corporate finance. Proven expertise in financial modeling, credit analysis, and portfolio management drives significant business growth. Collaborative project work with cross-functional teams enhances strategic contributions. Comprehensive analytical support includes managing internal compliance requirements and producing management reports that inform critical decision-making. Enjoys engaging clients during pitches, translating complex financial information into actionable insights. A strong commitment to building equitable employment environments fuels eagerness for a role at Jobs for Humanity.

## EXPERIENCE

### Investment Banking Associate

Greenwood Capital 📅 January 2023 - Present 📍 Chicago, IL

Role encompasses collaboration with Corporate Banking Analysts and Portfolio Managers, facilitating comprehensive financial analyses and client support on various initiatives.

- Partnered with Corporate Banking Analysts to enhance decision-making through intricate financial modeling and credit analyses.
- Communicated effectively during client pitches, simplifying complex financial data to align stakeholder interests.
- Ensured compliance adherence along with thorough preparation of management reports to support regulatory obligations.
- Conducted insightful portfolio monitoring, identifying trends contributing to impactful strategic recommendations.
- Coordinated closely with Relationship Bankers to optimize credit lending solutions, enhancing overall client satisfaction.
- Played a key role in developing innovative financial products by collaborating across departments, fostering competitive positioning in the market.

### Financial Analyst

Evergreen Financial Group 📅 June 2021 - December 2022 📍 Chicago, IL

Focused on delivering analytical support for credit evaluations while working collaboratively within diverse teams to streamline processes.

- Enhanced risk evaluation frameworks for new clients, leading to significant improvements in accuracy.
- Developed dynamic financial models that supported strategic planning and bolstered investment decision-making.
- Collaborated on projects aimed at refining reporting processes, noticeably reducing turnaround times for key deliverables.
- Identified new investment opportunities through extensive market research, positively impacting company growth metrics.
- Contributed actively to the training of junior analysts, promoting continuous learning within the team.
- Managed relationships with clients, ensuring open lines of communication and prompt resolution of inquiries.

## LEADERSHIP & AWARDS

- Recipient of the Academic Excellence Award from University of Illinois for outstanding performance in finance coursework.

## EDUCATION

Bachelor's Degree in Finance

## LANGUAGES

English Native

Spanish Intermediate

## MY CAREER



● Investment Banking  
Associate at Greenwood Capital  
(3.5 Years)

● Financial Analyst at  
Evergreen Financial Group (1.5  
Years)

University of Illinois 🎓 GPA: 3.7 📅 2021 📍 Champaign, IL

**Coursework:** *Financial Analysis, Corporate Finance, Investment Strategies, Financial Markets*

## CERTIFICATIONS

- Certified Financial Analyst (CFA) Level I 📅 2023
- Financial Modeling Certification 📅 2023

## TECHNICAL SKILLS

- **Analytical Tools:** Excel, Tableau, R
- **Financial Software:** Bloomberg, FactSet, QuickBooks
- **Statistical Methods:** Regression Analysis, Forecasting, Sensitivity Analysis
- **Compliance Standards:** FINRA, SEC Regulations, Dodd-Frank Act
- **Presentations Tools:** PowerPoint, Canva, Prezi
- **Database Management:** SQL, Microsoft Access, Oracle
- **Research Platforms:** PitchBook, CB Insights, Thomson Reuters
- **Communication Tools:** Slack, Microsoft Teams, Zoom
- **Financial Reporting Tools:** Xero, NetSuite, SAP
- **Modeling Frameworks:** Moodys Analytics Model, S&P Capital IQ, Black-Scholes Model

## PROFESSIONAL AFFILIATIONS

- Member of the Finance Club at University of Illinois, leading workshops on financial literacy.
- Active participant in local organization advocating for inclusive career pathways in finance.

## ADDITIONAL INFORMATION

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

## REFERENCES

AVAILABLE ON REQUEST