

# 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

### 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.

Presentation Skills

Process Improvement

## 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)

## EDUCATION

### Bachelor's Degree in Finance

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