Elijah Nunez

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SUMMARY

Resourceful finance professional with over five years in investment banking, adeptly advising clients through strategic transactions in sectors like Insurance and FinTech. Strong track record includes conducting comprehensive financial analysis, developing advanced models, and enhancing decision-making processes with actionable insights. Proven ability to build relationships with stakeholders, ensuring smooth execution and fostering team collaboration for optimal outcomes. Committed to recognizing industry trends and facilitating sustainable finance solutions while delivering exceptional client service and support. Eager to contribute extensive experience in a collaborative environment for mutual growth.

EXPERIENCE

Investment Banking Associate — January 2022 - Present

Innovative Financial Group — *New York, NY*

Serve as an associate within the investment banking division, focusing on financing strategies and completion of high-stakes transactions. Lead project teams and maintain open communication among cross-functional partners to ensure clarity and efficiency throughout each transaction process.

- Advised clients on diverse transactions with an emphasis on Insurance and FinTech, strengthening client loyalty through personalized engagement.
- Conducted thorough market and financial analyses, uncovering impactful insights that drove strategic decisions for clients seeking competitive advantage.
- Crafted and delivered detailed presentations for senior leaders and stakeholders, merging technical details with compelling narratives to solidify relationship trust.
- Oversaw management of financial transactions, rallying efforts from internal teams and external advisers to deliver timely and successful project outcomes.
- Developed robust financial models to assess transaction viability, identifying opportunities and risks while aligning objectives with client needs.
- Collaborated closely with legal practices to draft compliance documentation, safeguarding accuracy and alignment with regulatory requirements.

Financial Analyst — June 2018 - December 2021

Capital Advisors LLC — *New York, NY*

Worked as a financial analyst, engaging in significant valuation and economic assessments to guide the firm's investment strategies. Coordinated across various departments ensuring projects met expectations and timelines.

- Executed comprehensive financial valuation and analyses for client's investment initiatives, facilitating informed and strategic business decisions.
- Played a vital role in preparing client proposals and reports, enhancing the company’s reputation and establishing stronger client partnerships.
- Assisted senior bankers in managing financing options and transactions, harmonizing team efforts with client goals to achieve maximum effectiveness.
- Led due diligence studies and market research to analyze financial health, directing actionable recommendations that supported leadership choices.
- Engaged actively with industry counterparts, nurturing relationships that opened doors to new business avenues and collaborations.
- Participated candidly in strategy sessions, sharing unique insights that improved project methodologies and collective outcomes.

LEADERSHIP & AWARDS

- Received the Excellence Award for outstanding performance and client service in 2021 at Innovative Financial Group.
- Recognized as a top contributor in annual strategic projects, fostering innovation and collaboration among colleagues.

EDUCATION

Bachelor's Degree in Finance — 2018

University of New York GPA: 3.7 — *New York, NY*

Coursework: *Investment Strategies, Market Analysis, Risk Management, Corporate Finance*

CERTIFICATIONS

- Financial Modeling & Valuation Analyst (FMVA) 2020
- Certified Investment Banking Professional (CIBP) 2021

TECHNICAL SKILLS

- **Financial Modeling Software:** Excel, MATLAB, SPSS
- **Presentation Tools:** PowerPoint, Google Slides, Prezi
- **Data Analysis Tools:** Tableau, R, SAS
- **CRM Systems:** Salesforce, HubSpot, Zoho
- **Research Platforms:** Bloomberg Terminal, FactSet, S&P Capital IQ
- **Valuation Methodologies:** Discounted Cash Flow, Comparable Company Analysis, Precedent Transactions
- **Regulatory Compliance Tools:** LexisNexis, Thomson Reuters, SEC EDGAR
- **Sustainability Frameworks:** Global Reporting Initiative, ESG Metrics, Sustainable Stock Exchanges Initiative
- **Risk Assessment Tools:** Scenario Analysis, Monte Carlo Simulation, Stress Testing
- **Project Management Software:** Asana, Trello, Monday.com

SKILLS

- Financial Analysis
- Valuation
- Financial Modeling
- Client Relationship Management
- Strategic Planning
- Market Research
- Presentation Skills
- Cross-Functional Collaboration
- Due Diligence
- Risk Management
- Data Visualization
- Executive Engagement
- Financial Reporting
- Compliance Review
- Transaction Execution

PROFESSIONAL AFFILIATIONS

- Active member of the Association for Financial Professionals promoting best practices in finance.
- Frequent participant in workshops focused on sustainable investment and finance networking events.

LANGUAGES

- English (Native)
- Spanish (Proficient)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST