

# Xiao Willis

## Capital Markets Investment Analyst Intern

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### STRENGTHS

- Analytical Mindset**  
Transforms complex data into actionable insights, gaining executive confidence in pivotal decisions.
- Effective Communicator**  
Conveys technical concepts clearly, establishing trust with investors and internal teams alike.
- Proactive Collaborator**  
Cultivates strong relationships across departments, often leading cross-functional discussions that prompt innovation.
- Dynamic Problem Solver**  
Addresses challenges creatively and consistently improves workflows for enhanced project efficacy.
- Detail-Oriented Executor**  
Manages multiple tasks without compromising quality, ensuring timely delivery of all materials.

### SKILLS

Microsoft Excel Data Analysis  
Market Research CRM Software  
Financial Modeling  
Attention to Detail  
Contract Management  
Presentation Skills  
Social Media Marketing  
Public Relations Investor Relations  
Negotiation Skills  
Team Collaboration

### SUMMARY

Enthusiastic and proactive Capital Markets Analyst eager to contribute strategic insights and data-driven solutions. Extensive experience in financial analysis, market research, and operational support empowers effective collaboration with diverse teams. Successfully backed commercial real estate endeavors through meticulous analytical work while enhancing outreach via compelling marketing strategies. Currently focused on maximizing database management for stakeholders' needs, showcasing a commitment to driving action and informed investment decisions. Seeking an opportunity at Creative Solutions for hands-on immersion which will lead to innovation in real estate practices.

### EDUCATION

#### Bachelor's Degree in Finance

University of Akron 🎓 GPA: 3.8 📅 2024 📍 Akron, OH

**Coursework:** *Financial Analysis, Market Research, Real Estate Principles, Investment Strategies*

### TECHNICAL SKILLS

- Financial Tools:** Argus, CoStar, Bloomberg
- Communication Tools:** Microsoft Outlook, Slack, Zoom
- Database Management:** Salesforce, HubSpot, Excel
- Research Methodologies:** Qualitative Analysis, Quantitative Assessment, Case Studies
- Design Software:** Adobe InDesign, Canva, Microsoft PowerPoint
- Social Media Platforms:** LinkedIn, Instagram, Facebook
- Statistical Analysis:** SPSS, Tableau, R
- Presentation Software:** Microsoft PowerPoint, Google Slides, Prezi
- Project Tracking Tools:** Trello, Asana, Monday.com
- Financial Modelling Software:** Excel, Argus, R

### EXPERIENCE

#### Capital Markets Analyst

Innovative Realty Group 📅 June 2025 - Present 📍 Columbus, OH

Focuses on facilitating investment decisions through comprehensive financial analyses, enhancing stakeholder engagement.

- Conduct detailed lease abstracts and financial assessments to guide investment ventures.
- Create engaging marketing content promoting offerings across social media platforms.
- Collaborate efficiently with brokerage team to identify trends and monitor operational activities.
- Organize databases ensuring streamlined access to critical investor and property information.

#### Real Estate Intern

Bright Future Investments 📅 June 2024 - May 2025 📍 Cincinnati, OH

Supported various facets of commercial property evaluation while refining communication skills across all channels.

- Prepared insightful market research reports contributing to clearer project initiatives.
- Developed promotional content ensuring resonance with target investor demographics.
- Assisted direct campaigns increasing outreach opportunities with potential clients.
- Maintained logs of client communications for effective follow-up and relationship-building.

Project Coordination

Risk Assessment

## LANGUAGES

English Native

Spanish Intermediate

## MY CAREER



● Capital Markets Analyst at Innovative Realty Group (1 Years)

● Real Estate Intern at Bright Future Investments (11 Months)

## LEADERSHIP & AWARDS

- CCIM Designation Achieved in 2025 enhances credibility in commercial investment analysis.
- Recognition as 'Rising Star' by Innovative Realty Group for innovative contributions to core projects.

## CERTIFICATIONS

- Certified Commercial Investment Member (CCIM) 📅 2025
- Fundamentals of Commercial Real Estate Certification 📅 2025

## PROFESSIONAL AFFILIATIONS

- Member, ULI (Urban Land Institute) fostering connections within the real estate community.
- Participated in City Planning Committee advocating for sustainable development initiatives.

## ADDITIONAL INFORMATION

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

## REFERENCES

AVAILABLE ON REQUEST