

# King Wilkinson

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123 Main St, Chicago, IL 60601

## SUMMARY

Strategic Investment Banking Associate with over 3 years of experience in M&A and capital markets transactions. Contributed to effective deal execution through in-depth financial modeling and analytical assessments. Proven ability to create high-quality deliverables that resonate with clients, encompassing pitch books and presentations. Known for managing multiple projects simultaneously without compromising on quality or timelines. Valuated companies thoroughly while developing unique insights that guided firm strategies and client decisions. Passionate about innovative approaches to transaction support and proud of building strong relationships with clients and senior bankers.

## EXPERIENCE

### Investment Banking Associate

January 2024 - Present

Greenfield Advisors

Chicago, IL

Served as an Investment Banking Associate supporting M&A execution and capital raising initiatives. Collaborated closely with senior bankers on strategic matters and maintained a client-focused approach throughout the transaction lifecycle.

- Facilitated M&A transaction execution by actively participating in both sell-side and buy-side processes across various sectors.
- Created detailed financial models including DCF and comparable analyses, enhancing strategic decision-making for clients.
- Developed comprehensive client deliverables such as pitch books and management presentations enhancing engagement and client satisfaction.
- Conducted valuation analysis alongside rigorous industry research which illuminated trends impacting strategic recommendations.
- Oversaw due diligence coordination involving clients and advisers ensuring timely access to accurate information.
- Partnered with senior bankers delivering insights that supported negotiations and contributed to successful transaction closures.

### Investment Banking Analyst

June 2021 - December 2023

Summit Financial Group

Chicago, IL

Worked as an Investment Banking Analyst focusing on financial modeling for M&A deals and capital raises. Gained valuable exposure to client interactions and documentation processes.

- Assisted in constructing and maintaining intricate financial models crucial for various M&A and capital raising projects.
- Performed extensive company diligence and financial reviews guaranteeing precision in client presentations and reports.
- Authored pitch materials and board presentations effectively communicating financial data in simplified formats.
- Streamlined due diligence processes by coordinating efforts among stakeholders significantly reducing turnaround times.
- Supported drafting of transaction documents complying with regulatory necessities and client demands.
- Guided junior analysts sharing knowledge on financial modeling techniques and fostering their professional growth.

## LEADERSHIP & AWARDS

- Recipient of Summit Financial Excellence Award for exceptional performance in 2022.
- Recognized by Greenfield Advisors for Outstanding Client Engagement in 2025.

## EDUCATION

### Bachelor's Degree in Finance

2021

University of Illinois at Chicago GPA: 3.8

Chicago, IL

**Coursework:** Corporate Finance, Financial Analysis, Mergers and Acquisitions, Risk Management

## CERTIFICATIONS

- Certified Financial Modeling & Valuation Analyst (FMVA) 📅 2023
- Chartered Financial Analyst (CFA) Level I Candidate 📅 2026

## TECHNICAL SKILLS

- Financial Modeling Tools:** Excel, PowerPivot, Tableau
- Presentation Software:** PowerPoint, Prezi, Google Slides
- Valuation Methods:** Discounted Cash Flow, Comparable Company Analysis, Precedent Transactions
- Research Platforms:** Bloomberg Terminal, Capital IQ, S&P CapitalComps
- Data Management Systems:** SQL, Microsoft Access, Salesforce
- Documentation Standards:** IFRS, GAAP, SEC Regulations
- Collaboration Tools:** Slack, Asana, Trello

- **Market Analytics:** Morningstar, Pitchbook, Dealogic
- **Risk Assessment Frameworks:** SWOT Analysis, Monte Carlo Simulation, Sensitivity Analysis
- **Project Management Methodologies:** Agile, Waterfall, Lean Six Sigma

**SKILLS**

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- Financial Modeling
- PowerPoint
- Regulatory Compliance
- Negotiation Support
- M&A Transactions
- Valuation Analysis
- Transaction Documentation
- Data Room Management
- Capital Markets
- Client Relationship Management
- Financial Analysis
- Pitch Presentation Development
- Excel
- Due Diligence
- Industry Research
- Analytical Reporting

**PROFESSIONAL AFFILIATIONS**

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- Active member of the Finance & Investments Society at University of Illinois.
- Volunteered with Junior Achievement to support youth in financial literacy education.

**LANGUAGES**

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- English (Native)
- Spanish (Proficient)

**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