Emilio Benson

Investment Banking Associate

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SUMMARY

Investment Banking Associate with over 6 years of experience in mergers and acquisitions. Proven expertise in financial analysis, corporate transaction evaluations, and client development. Skilled in leading teams, mentoring junior analysts, and driving strategic advisory services while ensuring compliance with regulations. Strong communication skills focused on building client relationships and delivering impactful financial solutions. Ready to contribute to FinCorp's success through proactive execution of investment banking activities, leveraging past experiences, managing risk, and fostering a team-oriented environment.

EXPERIENCE

Investment Banking Associate

Global Investment Partners June 2021 - Present New York, NY

Directs M&A transactions and capital raising initiatives while providing mentorship to junior analysts. Collaborates with cross-functional teams to drive compliance, enhance business operations, and improve client engagement and satisfaction.

- Led the execution of merger and acquisition transactions, facilitating significant capital raised for clients across various industries.
- Developed detailed financial models that informed client decision-making processes and improved transactional outcomes.
- Mentored junior analysts, enhancing their analytical abilities and steering them towards strategic investment strategies.
- Collaborated with interdisciplinary teams to analyze market trends, driving actionable insights for client recommendations.
- Maintained rigorous adherence to compliance standards during transactions, reinforcing trust among stakeholders and clients.
- Contributed to impactful pitches and presentations, directly improving business development metrics.

Investment Banking Analyst

Capital Advisors LLC August 2018 - May 2021 New York, NY

Provided essential support in executing investment banking transactions, enhancing operational efficiency and deal closure rates. Fostered teamwork to cultivate effective client relationship management.

- Supported senior associates in closing investment banking transactions, focusing on deal negotiation and successful execution.
- Conducted thorough industry research and financial analyses assessing potential opportunities, risks, and overall market sustainability.
- Prepared pitch books that successfully engaged clients, increasing retention and enhancing feedback on service quality.
- Handled compliance documentation preparation, ensuring alignment with industry regulations and best practices.
- Streamlined information flow within teams, significantly expediting project turnaround times and enhancing collaboration.
- Engaged actively in developing client relations, carving pathways for future funding and investment opportunities.

Financial Analyst

Equity Group June 2016 - July 2018 New York, NY

Focused on performance analysis and financial reporting while collaborating with clients on strategy refinement and expectations for engagement metrics.

- Generated comprehensive financial reports aiding corporate clients in shaping strategic planning initiatives.

STRENGTHS

Analytical Thought
Craft innovative solutions by evaluating challenges deeply. Peers often seek unique perspectives on complex analyses.

Team Leadership
Foster team cohesion and knowledge sharing, which has led to enhanced performance and camaraderie among colleagues.

Client Relations
Built lasting relationships with clients by delivering tailored advice and maintaining communication, earning their trust.

Problem Solver
Implemented effective problem-solving methodologies that improved project outcomes and enhanced stakeholder satisfaction.

Regulatory Awareness
Consistently applies regulations to practice standards, ensuring compliance across various projects, fostering firm integrity.

SKILLS

Mergers & Acquisitions

Financial Modelling

Business Development

Risk Assessment

Strategic Advisory

Transaction Structuring

Client Engagement

Market Research | Data Analysis

Regulatory Compliance

Valuation Techniques

Portfolio Management

Reporting Standards

Industry Analysis | Team Mentoring

LANGUAGES

English — Native

Spanish — Proficient

MY CAREER

- Investment Banking Associate at Global Investment Partners (5.1 Years)
- Investment Banking Analyst at Capital Advisors LLC (2.8 Years)
- Financial Analyst at Equity Group (2.1 Years)

- Participated in valuations of potential acquisitions, employing diverse financial modeling methodologies and assisting investment decisions.
- Collected client feedback and modified financial services accordingly, yielding positive shifts in satisfaction metrics.
- Created engaging presentations for board meetings, aligning discussions around strategic objectives and highlighting successes.
- Evaluated corporate transaction structures, provided data-driven insights supporting senior management's decisions.
- Worked closely with compliance aspects to uphold regulatory standards in all financial assessments.

LEADERSHIP & AWARDS

- Top Performer Award at Global Investment Partners in 2022 for excellence in closing major transactions.
- Recognized by Capital Advisors LLC as Employee of the Month for exceeding client development targets in 2020.

EDUCATION

Bachelor of Arts in Finance

University of New York | GPA: 3.7 | 2016 | New York, NY

Coursework: *Corporate Finance, Investment Analysis, Financial Markets, Economic Theory*

CERTIFICATIONS

- Series 79 License 2021
- Series 63 License 2021

TECHNICAL SKILLS

- **Financial Analysis Tools:** Excel, Bloomberg, FactSet
- **Presentation Software:** PowerPoint, Prezi, Keynote
- **Database Management:** SQL, Oracle, MS Access
- **Project Management Software:** Asana, Trello, JIRA
- **Visualization Tools:** Tableau, Power BI, Qlik Sense
- **Statistical Analysis Software:** R, Python, SAS
- **Investment Platforms:** Etrade, TD Ameritrade, Charles Schwab
- **Compliance Frameworks:** Basel III, Dodd-Frank, SOX
- **Portfolio Management Systems:** Morningstar Direct, Advent, eFront
- **Value Metrics:** NPV, IRR, ROI

PROFESSIONAL AFFILIATIONS

- Member of the CFA Institute, participating in continual professional education and networking events.
- Active participant in local finance societies, contributing knowledge and insights from the investment banking sector.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST