Edwin Rice

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SUMMARY

Accomplished investment banking professional with over six years dedicated to facilitating successful M&A transactions within the healthcare sector. Expertise spans financial modeling and valuation, coupled with an ability to nurture client relationships that yield tangible results. Proven track record in creating engaging marketing collateral and client presentations that effectively convey complex financial data. Highly skilled in conducting thorough analyses to underpin business decisions and drive strategic outcomes. Committed to elevating team performance through mentorship and fostering a collaborative environment.

EXPERIENCE

Vice President
March 2021 - Present

Capital Markets Group — *Dallas, TX*

Lead diverse operations as Vice President, focused on delivering viable financial solutions for clients in the M&A sector. Deliver comprehensive oversight in evaluating submissions and ensuring exemplary service delivery.

- Spearheaded detailed financial model development for M&A initiatives, increasing precision in transaction outcomes.
- Coordinated rigorous due diligence processes for high-profile healthcare mergers, upholding stringent analysis standards.
- Created impactful marketing pitches and confidential information materials that fostered new client relationships and enhanced sales growth.
- Drove valuation analysis processes that clarified strategic decisions regarding client investments.
- Cultivated strong partnerships with key stakeholders, leading to expanded business avenues.
- Mentored junior analysts by offering pivotal insights and sharing knowledge about effective financial practices.

Senior Associate
June 2018 - February 2021

Investment Banking Solutions — *San Antonio, TX*

Served as Senior Associate, executing analysis and engagement strategies that significantly improved firm visibility and competitive edge in the healthcare sector.

- Developed intricate financial models while maintaining analytic precision, enhancing support for M&A transactions.
- Assisted in preparing dynamic management presentations that conveyed critical strategic insights to buyers.
- Fostered cooperation between cross-functional teams to ensure transaction objectives aligned seamlessly with client expectations.
- Played an essential role in executing healthcare-focused transactions that yielded significant improvements in revenue.
- Conducted extensive market research, identifying promising acquisition opportunities while refining the advisory process.
- Presented actionable findings to senior decision-makers, influencing long-term strategic goals.

Analyst
July 2016 - May 2018

Healthcare Advisory Group — *Austin, TX*

Initiated career as an Analyst contributing valuable financial insights toward M&A endeavors in the healthcare field.

- Executed robust financial analyses and provided crucial market research that supported successful transaction closures.
- Produced articulate reports and visually compelling presentations for client engagements, emphasizing professionalism.
- Collaborated effectively with peers to enhance financial models and streamline analytical tools.
- Maintained organized client databases, tracking industry trends, offering pertinent insights to leadership.
- Supported thorough due diligence efforts through effective financial information gathering from diverse sources.
- Took part in training new employees, sharing expertise on fundamental financial analysis techniques.

LEADERSHIP & AWARDS

- Recognized for Outstanding Business Development Contribution in Financial Excellence at Capital Markets Group.
- Received Employee of the Year Award at Investment Banking Solutions for exemplary teamwork and performance.

EDUCATION

Bachelor of Science in Finance — 2016

University of Texas at Austin GPA: 3.8 — *Austin, TX*

Coursework: *Corporate Finance, Financial Modeling, Investment Analysis, Risk Management*

CERTIFICATIONS

- Certified Financial Analyst (CFA) 2022
- FINRA Series 79 License 2021

TECHNICAL SKILLS

- **Financial Software:** Bloomberg, FactSet, Capital IQ
- **Presentation Tools:** Microsoft PowerPoint, Canva, Prezi
- **Data Analysis Tools:** Excel, R, Python
- **Modeling Techniques:** Discounted Cash Flow, Comparable Company Analysis, Precedent Transactions
- **Market Research Platforms:** Thomson Reuters, Pitchbook, IBISWorld
- **Project Management Tools:** Asana, Trello, JIRA
- **Communication Tools:** Slack, Microsoft Teams, Zoom
- **Compliance Technologies:** SSAE 16, FINRA Regulations, SEC Filings
- **Networking Opportunities:** Local Investment Forums, CFA Events, Alumni Networks
- **Client Management Systems:** Salesforce, HubSpot, Zoho CRM

SKILLS

- Financial Modeling
- Valuation
- M&A Transactions
- Client Relationship Management
- Due Diligence
- Market Research
- Presentation Skills
- Strategic Planning
- Risk Assessment
- Negotiation Skills
- Performance Metrics
- Quantitative Analysis
- Financial Reporting
- Compliance Standards
- Team Leadership

PROFESSIONAL AFFILIATIONS

- Active member of the CFA Institute, promoting best practices in finance.
- Participate in local investment banking associations to share industry insights and expand professional network.

LANGUAGES

- English (Native)
- Spanish (Proficient)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST