Milo Johnston

Managing Director, Investment Banking

(608) 555-1234 milo.johnston@example.com

linkedin.com/in/milojohnston 1234 Maple Lane, Madison, WI 53703

STRENGTHS

Client Relationship Building
Developing long-term connections with clients has always translated into repeat business and referrals.

Analytical Proficiency
Transforming complex data into actionable insights allowed clients to make informed decisions effectively.

Team Leadership
Leading and mentoring subordinates inspired confidence and elevated group productivity through shared objectives.

Negotiation Expertise
Successfully managing contracts directly contributed toward better terms, driving client satisfaction up.

Strategic Vision
Formulating forward-thinking strategies resulted in greater adaptability and resilience amid market fluctuations.

SKILLS

Financial Analysis

Mergers and Acquisitions

Business Development

Client Relationship Management

Team Leadership

Strategic Planning Data Analytics

Risk Management

Regulatory Compliance

SUMMARY

Results-oriented financial professional driving value with over a decade in investment banking. Expertise encompasses mergers and acquisitions, strategic financial advisory, and business development leadership. Proven ability to guide management teams towards achieving substantial revenue results through tailored client services and effective transaction execution. Cultivating lasting relationships has led to thriving partnerships, positioning firms for sustained success. Committed mentor fostering team growth through knowledge sharing and hands-on training. Prepared to leverage analytical acumen and market insights to enhance client engagements and contribute positively to overall firm objectives.

EXPERIENCE

Managing Director

XYZ Investment Partners June 2021 - Present Chicago, IL

Oversaw a highly talented team at a leading investment firm specializing in M&A activities. Provided strategic direction while ensuring compliance and operational efficiency in alignment with client expectations. Managed high-profile buy-side and sell-side transactions, enhancing business outcomes through effective team collaboration.

- Engineered robust financial strategies guiding clients through intricate negotiations.
- Elevated revenue through decisive business development efforts, effectively doubling client engagement.
- Coordinated with cross-functional teams to streamline due diligence processes and delivery timelines.
- Instilled a culture of mentorship, offering training sessions on advanced financial modeling techniques.
- Spearheaded initiatives that enhanced the firm's network, successfully converting prospects into long-term clients.
- Facilitated comprehensive financial analyses promoting strategic insight among executive stakeholders.

Senior Vice President

LMN Financial Advisors March 2016 - May 2021 Detroit, MI

Led challenging negotiations over various transactions, focusing on favorable outcomes for diverse clientele. Developed strong organizational strategies enhancing collaboration and communication across dedicated finance teams.

- Directed high-profile financial transactions, mentoring junior staff during intensive deal closings.
- Transformed internal operations to foster seamless workflows, accelerating project timeline by implementing technology-aided solution.
- Approached client presentations by simplifying complex financial theories, earning trust throughout engagements.
- Analyzed relevant market indicators providing significant insights into strategy effectiveness.
- Engaged stakeholders regularly ensuring alignment between financial goals and client expectations.
- Contributed significantly to performance enhancements winning commendations from clients and top management.

Vice President

OPQ Capital Group January 2013 - February 2016 New York, NY

Executed detailed assessments on investment opportunities in a competitive finance sector. Built solid relationships enhancing customer satisfaction and loyalty through targeted client interaction methods.

- Constructed comprehensive models predicting financial trends backed by statistical accuracy.

- Market Research
- Valuation Techniques
- Negotiation Strategies
- Operational Efficiency
- Transaction Execution
- Due Diligence

LANGUAGES

English — Native

Spanish — Intermediate

MY CAREER

- Managing Director at XYZ Investment Partners (5.1 Years)
- Senior Vice President at LMN Financial Advisors (5.2 Years)
- Vice President at OPQ Capital Group (3.1 Years)

- Conducted rigorous analysis ensuring thorough evaluations of client propositions and strategic decisions.
- Led innovative workshops focused on developing core competencies in financial appraisals and risk assessments.
- Established efficient training routines bolstering junior analyst’s skills in direct client dealings.
- Drove innovative business strategies via competitor analyses and data-driven recommendations.
- Prepared crucial documentation guaranteeing clarity, consistency, and regulatory adherence.

LEADERSHIP & AWARDS

- Top Advisor Award at XYZ Investment Partners in 2022 for outstanding client service and remarkable deal closure rates.
- Recognized as Best Team Leader at LMN Financial Advisors in 2019 highlighting successful mentorship and performance enhancement initiatives.

EDUCATION

MBA

University of Wisconsin-Madison GPA: 3.8 2013 Madison, WI

Coursework: *Strategic Management, Financial Analysis, Mergers and Acquisitions, Business Development*

Bachelor's Degree in Finance

University of Illinois Urbana-Champaign GPA: 3.6 2011 Champaign, IL

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

CERTIFICATIONS

- FINRA Series 63 2021
- FINRA Series 7 2021
- FINRA Series 79 2023

TECHNICAL SKILLS

- **Financial Software:** Bloomberg Terminal, FactSet, Thomson Reuters
- **Project Management Tools:** Asana, Microsoft Project, Trello
- **Presentation Tools:** Microsoft PowerPoint, Google Slides, Prezi
- **Accounting Software:** QuickBooks, Oracle Financial Services, SAP
- **Data Analysis Tools:** Excel, R, Python
- **Communication Platforms:** Slack, Microsoft Teams, Zoom
- **CRM Systems:** Salesforce, HubSpot, Zoho
- **Statistical Tools:** Tableau, SPSS, SAS
- **Valuation Methodologies:** DCF, Comparable Company Analysis, Precedent Transactions
- **Compliance Standards:** GAAP, IFRS, SEC Regulations

PROFESSIONAL AFFILIATIONS

- Member of the Chartered Financial Analyst (CFA) Institute since 2015, participating in networking events and ongoing education.
- Engage actively in the Association for Corporate Growth (ACG), contributing insights within panels on M&A strategies.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST