Sebastian Marshall

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SUMMARY

Investment banking professional with over 4 years of experience in financial analysis and corporate finance. Skilled in preparing client presentations and complex financial models while mentoring analysts to strengthen team capabilities. Proven ability to manage multiple projects with competing deadlines without compromising quality. Adept at fostering deep client relationships, collaborating across various products, and exploring innovative financial solutions. Energetic and committed to achieving business goals, contributing values aligned with company objectives, and encouraging a high-performance culture that focuses on inclusion.

EXPERIENCE

Investment Banking Associate — June 2024 - Present

Capital Finance Group — *Houston, TX*

Lead role analyzing corporate financial requirements via detailed modeling and strong advisory inputs. Drive collaboration amongst stakeholders to ensure desired outcomes for clients, enhancing overall business success through structured transactional efforts.

- Craft financial models supporting mergers and acquisitions that improve decision-making processes for clients.
- Develop client-facing materials under tight deadlines, contributing capital raises exceeding $150 million.
- Mentor junior staff, providing training on financial analysis methodology and engagement strategies.
- Foster cross-functional teamwork, enabling effective evaluation of client situations while crafting tailored solutions.
- Perform comprehensive analyses of financial statements, isolating key metrics for high-impact client advisories.
- Support structured deal execution progressively with increased accountability, leading from involvement to lead roles.

Financial Analyst — August 2022 - May 2024

Greenfield Advisors — *Houston, TX*

Contributed to financial memoranda and projections in a collaborative environment focused on new client engagement initiatives. Improved internal operational structures through strategic insights and market research for better financial recommendations.

- Assisted in drafting investment documents driving a substantial 30% hike in prospective clientele.
- Performed trend analyses used for credible strategy formation during corporate finance proposals.
- Strengthened existing client relations via regular updates and consultations for significant projects.
- Collaborated on presentation materials, elevating the appeal and clarity of senior-level proposals.
- Effectively prioritized numerous deadlines resulting in consistent project completion within set timelines.
- Joined senior bankers from varied departments on structuring financing mechanisms fueling transaction growth.

Junior Financial Analyst — January 2021 - July 2022

Eagle Wealth Management — *Houston, TX*

Gained foundational expertise supporting senior team members in developing financial syndications and constructing exemplary performance reports. Contributed appreciably to team synergies in delivering seamless client interaction and compliance standards.

- Collaborated directly with senior analysts to create accurate financial models, facilitating entry into crucial market segments.
- Engaged in clients' discussions providing necessary data enhancements to foster productive dialogues.
- Evaluated industry benchmarks leading to improved competitive edges in proposal qualifications.
- Streamlined internal reporting processes gaining recognition within teams for resulting time efficiencies.
- Facilitated adherence to regulatory expectations by maintaining meticulous documentation across functions.
- Developed automated analytical tools utilizing Excel, significantly truncating reporting tasks.

LEADERSHIP & AWARDS

- Dean's List, University of Houston (2020-2021)
- Best Presentation Award, Finance Student Competition (2021)

EDUCATION

Bachelor's Degree in Business Administration — 2021

University of Houston GPA: 3.7 — *Houston, TX*

Coursework: *Financial Analysis, Corporate Finance, Advanced Excel, Investment Strategies*

CERTIFICATIONS

- FINRA Series 79 License 2026
- Microsoft Excel Certification 2025

TECHNICAL SKILLS

- **Finance Tools:** Excel, Bloomberg Terminal, Tableau
- **Statistical Analysis:** R, Python, SAS
- **Presentation Software:** PowerPoint, Google Slides, Keynote
- **Relationship Management Systems:** Salesforce, HubSpot, MS Dynamics
- **Corporate Governance:** Dodd-Frank, Sarbanes-Oxley, Basel III
- **Accounting Software:** QuickBooks, NetSuite, FreshBooks
- **Project Management Tools:** Trello, Asana, Monday.com
- **Research Platforms:** Morningstar, Thomson Reuters, FactSet
- **Investment Analytics:** PitchBook, Dealogic, CB Insights
- **Collaboration Tools:** Slack, Microsoft Teams, Zoom

SKILLS

- Financial Modeling
- Corporate Finance
- Investment Analysis
- Excel
- Data Analysis
- Client Relationship Management
- Market Research
- Financial Statement Analysis
- Transaction Structuring
- Advisory Services
- Risk Management
- Compliance Documentation
- Presentations
- Business Development
- Team Collaboration
- Strategic Planning

PROFESSIONAL AFFILIATIONS

- Florida Institute of CPAs Member
- Houston Finance Network Volunteer

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST