

Edwin Navarro

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SUMMARY

Dynamic and results-oriented professional with 4 years of M&A experience in financial services. Expertise in financial valuations, industry analysis, and fostering relationships with clients. Proven ability to thrive in fast-paced environments while maintaining a detail-oriented focus. Skilled in preparing high-quality presentations and conducting thorough due diligence processes. Excited to contribute to the growth strategies at Global Capital Advisors and enhance franchise value through impactful initiatives.

EXPERIENCE

M&A Associate

June 2023 - Present

Capital Growth Partners

Los Angeles, CA

Currently driving financial analyses and valuations for M&A transactions within the financial services sector. Engaged with senior bankers and managed client interactions to ensure effective communication and presentation outcomes.

- Conducted detailed financial assessments on various merger targets, influencing key investment decisions.
- Collaborated with teams to create compelling information memoranda tailored for executive clientele.
- Identified potential acquisition leads through extensive market research, effectively increasing viable options.
- Streamlined due diligence processes, enhancing evaluation accuracy and compliance adherence during transactions.
- Participated actively in negotiations with clients, proving instrumental in finalizing several successful deals.
- Mentored junior analysts, instilling confidence and knowledge across the team.

M&A Analyst

May 2021 - May 2023

Equity Advisory Services

San Diego, CA

Contributed significant analytical support for valuation reports and strategic insights guiding firm recommendations at equity advisory services.

- Conducted comprehensive market analyses that aided C-level executives in decision-making.
- Established productive conversations with potential buyers, leading to flourishing business connections.
- Created presentations that elevated client engagement levels and promoted brand reputation in meetings.
- Guided management teams by delivering valuable insights into emerging market trends, actionable for execution.
- Facilitated cross-departmental collaborations that align strategic objectives, improving efficiency.
- Developed onboarding materials assisting new hires integrating seamlessly into the firm culture.

Financial Analyst Intern

June 2020 - August 2020

Strategic Investment Group

Remote

Internship focused on supporting senior analysts regarding investments through research and data-driven insights, laying foundations for robust financial reporting.

- Aided in constructing pitch books that significantly enhanced clarity and impact for client deliveries.
- Undertook market studies reflecting industry trends which contributed to evaluated investment opportunities.
- Analyzed financial health indicators of firms supporting holistic investment assessment.
- Engaged in regular brainstorming sessions to discuss project strategies enhancing the thought leadership output.
- Created user-friendly Excel models optimizing forecasting for better data reliability.
- Gained initial exposure to M&A best practices facilitating comfortable transition to professional engagements.

LEADERSHIP & AWARDS

- Honorary Academic Scholarship Recipient
- Outstanding Achievement in Finance Award

EDUCATION

Bachelor's Degree in Finance

2026

University of Southern California GPA: 3.8

Los Angeles, CA

Coursework: Investment Management, Financial Analysis, Corporate Finance, Valuation Techniques

CERTIFICATIONS

- Certified Financial Analyst (CFA) Level 1 📅 2026
- Financial Risk Manager (FRM) 📅 2026

TECHNICAL SKILLS

- **Financial Software:** Excel, Bloomberg Terminal, QuickBooks
- **Data Visualization Tools:** Tableau, Power BI, Google Data Studio
- **Market Research Platforms:** Statista, IBISWorld, PitchBook
- **Project Management Tools:** Asana, Trello, Microsoft Project
- **Presentation Software:** PowerPoint, Canva, Keynote
- **Communication Tools:** Slack, Teams, Zoom
- **Collaboration Tools:** SharePoint, Confluence, Google Workspace
- **Financial Modelling:** DCF, Comps, Precedent Transactions
- **Stock Market Analyzers:** Morningstar, Yahoo Finance, Seeking Alpha
- **Accounting Standards:** GAAP, IFRS, FASB

SKILLS

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|------------------------|----------------------------------|---------------------------|----------------------------------|
| • Financial Analysis | • Data Interpretation | • Due Diligence Processes | • Cross-functional Collaboration |
| • M&A Transactions | • Financial Reporting | • Presentation Skills | • Communication Skills |
| • Valuation Techniques | • Market Analysis | • Negotiation Strategies | • Decision-making |
| • Industry Research | • Client Relationship Management | • Mentorship | • Stakeholder Engagement |

PROFESSIONAL AFFILIATIONS

- Member, Finance Society at USC
- Volunteer, Local Financial Literacy Initiative

LANGUAGES

- English (Native)
- Spanish (Proficient)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST