



Edwin Navarro

Associate, Business Services M&A

☎ (415) 555-1234 ✉ edwin.navarro@example.com

🌐 linkedin.com/in/edwinnavarro 📍 123 Main St, San Francisco, CA 94105

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

Capital Growth Partners 📅 June 2023 - Present 📍 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

Equity Advisory Services 📅 May 2021 - May 2023 📍 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

Strategic Investment Group 📅 June 2020 - August 2020 📍 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.

STRENGTHS



Analytical Thinker

Transformed complex data into useful insights, guiding strategy discussions that drove business improvement.



Effective Communicator

Built relationships with clients ensuring transparency; peers often sought support for directing queries.



Proactive Learner

Consistently pursued opportunities for skill enhancements, contributing to improved team performance.



Team Contributor

Fostered collaborative efforts within projects, leading to smoother workflows and higher task success rates.



Innovative Problem Solver

Addressed challenges with creative solutions that benefitted project outcomes without disrupting flow.

SKILLS

Financial Analysis

M&A Transactions

Valuation Techniques

Industry Research

Data Interpretation

Financial Reporting

Market Analysis

Client Relationship Management

Due Diligence Processes

Presentation Skills

Negotiation Strategies Mentorship

Cross-functional Collaboration

Communication Skills

Decision-making

Stakeholder Engagement

LANGUAGES

English Native

Spanish Proficient

MY CAREER



● M&A Associate at Capital Growth Partners (3.1 Years)

● M&A Analyst at Equity Advisory Services (2 Years)

● Financial Analyst Intern at Strategic Investment Group (2 Months)

- 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

University of Southern California 🎓 GPA: 3.8 📅 2026 📍 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

PROFESSIONAL AFFILIATIONS

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

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST