



Karter Becker

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SUMMARY

Finance professional with over 4 years of experience in investment banking and corporate finance. Proven expertise in financial modeling, credit analysis, and portfolio management drives significant business growth. Collaborative project work with cross-functional teams enhances strategic contributions. Comprehensive analytical support includes managing internal compliance requirements and producing management reports that inform critical decision-making. Enjoys engaging clients during pitches, translating complex financial information into actionable insights. A strong commitment to building equitable employment environments fuels eagerness for a role at Jobs for Humanity.

EXPERIENCE

Investment Banking Associate

January 2023 - Present

Greenwood Capital

Chicago, IL

Role encompasses collaboration with Corporate Banking Analysts and Portfolio Managers, facilitating comprehensive financial analyses and client support on various initiatives.

- Partnered with Corporate Banking Analysts to enhance decision-making through intricate financial modeling and credit analyses.
- Communicated effectively during client pitches, simplifying complex financial data to align stakeholder interests.
- Ensured compliance adherence along with thorough preparation of management reports to support regulatory obligations.
- Conducted insightful portfolio monitoring, identifying trends contributing to impactful strategic recommendations.
- Coordinated closely with Relationship Bankers to optimize credit lending solutions, enhancing overall client satisfaction.
- Played a key role in developing innovative financial products by collaborating across departments, fostering competitive positioning in the market.

Financial Analyst

June 2021 - December 2022

Evergreen Financial Group

Chicago, IL

Focused on delivering analytical support for credit evaluations while working collaboratively within diverse teams to streamline processes.

- Enhanced risk evaluation frameworks for new clients, leading to significant improvements in accuracy.
- Developed dynamic financial models that supported strategic planning and bolstered investment decision-making.
- Collaborated on projects aimed at refining reporting processes, noticeably reducing turnaround times for key deliverables.
- Identified new investment opportunities through extensive market research, positively impacting company growth metrics.
- Contributed actively to the training of junior analysts, promoting continuous learning within the team.
- Managed relationships with clients, ensuring open lines of communication and prompt resolution of inquiries.

LEADERSHIP & AWARDS

- Recipient of the Academic Excellence Award from University of Illinois for outstanding performance in finance coursework.

EDUCATION

Bachelor's Degree in Finance

2021

University of Illinois GPA: 3.7

Champaign, IL

Coursework: Financial Analysis, Corporate Finance, Investment Strategies, Financial Markets

CERTIFICATIONS

- Certified Financial Analyst (CFA) Level I 📅 2023
- Financial Modeling Certification 📅 2023

TECHNICAL SKILLS

- **Analytical Tools:** Excel, Tableau, R
- **Financial Software:** Bloomberg, FactSet, QuickBooks
- **Statistical Methods:** Regression Analysis, Forecasting, Sensitivity Analysis
- **Compliance Standards:** FINRA, SEC Regulations, Dodd-Frank Act
- **Presentations Tools:** PowerPoint, Canva, Prezi

- **Database Management:** SQL, Microsoft Access, Oracle
- **Research Platforms:** PitchBook, CB Insights, Thomson Reuters
- **Communication Tools:** Slack, Microsoft Teams, Zoom
- **Financial Reporting Tools:** Xero, NetSuite, SAP
- **Modeling Frameworks:** Moodys Analytics Model, S&P Capital IQ, Black-Scholes Model

SKILLS

- Financial Modeling
- Credit Analysis
- Portfolio Management
- Regulatory Compliance
- Client Relationship Management
- Market Research
- Risk Management
- Data Visualization
- Report Preparation
- Financial Reporting
- Project Coordination
- Analytical Software
- Trend Analysis
- Presentation Skills
- Process Improvement

PROFESSIONAL AFFILIATIONS

- Member of the Finance Club at University of Illinois, leading workshops on financial literacy.
- Active participant in local organization advocating for inclusive career pathways in finance.

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST