



King Wilkinson

Investment Banking Associate

📞 (312) 555-1234 ✉ king.wilkinson@example.com

🌐 linkedin.com/in/kingwilkinson 📍 123 Main St, Chicago, IL 60601

STRENGTHS

- ♥ **Analytical thinking**
Applied advanced analytical skills to develop robust financial models, gaining executive confidence in findings.
- ✍ **Client communication**
Cultivated strong relationships with clients by communicating complex financial information clearly, bolstering trust.
- ✍ **Detail-oriented mindset**
Maintained thorough attention to details in all client deliverables, consistently surpassing expectations during pitch preparations.
- 💎 **Project management**
Coordinated multiple projects efficiently, implementing streamlined workflows that improved team productivity.
- 💡 **Team leadership**
Mentored junior analysts, providing guidance that cultivated a collaborative learning environment within the team.

SKILLS

Financial Modeling

M&A Transactions Capital Markets

Excel PowerPoint

Valuation Analysis

Client Relationship Management

Due Diligence

Regulatory Compliance

Transaction Documentation

Financial Analysis

Industry Research

Negotiation Support

SUMMARY

Strategic Investment Banking Associate with over 3 years of experience in M&A and capital markets transactions. Contributed to effective deal execution through in-depth financial modeling and analytical assessments. Proven ability to create high-quality deliverables that resonate with clients, encompassing pitch books and presentations. Known for managing multiple projects simultaneously without compromising on quality or timelines. Valuated companies thoroughly while developing unique insights that guided firm strategies and client decisions. Passionate about innovative approaches to transaction support and proud of building strong relationships with clients and senior bankers.

EXPERIENCE

Investment Banking Associate

Greenfield Advisors 📅 January 2024 - Present 📍 Chicago, IL

Served as an Investment Banking Associate supporting M&A execution and capital raising initiatives. Collaborated closely with senior bankers on strategic matters and maintained a client-focused approach throughout the transaction lifecycle.

- Facilitated M&A transaction execution by actively participating in both sell-side and buy-side processes across various sectors.
- Created detailed financial models including DCF and comparable analyses, enhancing strategic decision-making for clients.
- Developed comprehensive client deliverables such as pitch books and management presentations enhancing engagement and client satisfaction.
- Conducted valuation analysis alongside rigorous industry research which illuminated trends impacting strategic recommendations.
- Oversaw due diligence coordination involving clients and advisers ensuring timely access to accurate information.
- Partnered with senior bankers delivering insights that supported negotiations and contributed to successful transaction closures.

Investment Banking Analyst

Summit Financial Group 📅 June 2021 - December 2023 📍 Chicago, IL

Worked as an Investment Banking Analyst focusing on financial modeling for M&A deals and capital raises. Gained valuable exposure to client interactions and documentation processes.

- Assisted in constructing and maintaining intricate financial models crucial for various M&A and capital raising projects.
- Performed extensive company diligence and financial reviews guaranteeing precision in client presentations and reports.
- Authored pitch materials and board presentations effectively communicating financial data in simplified formats.
- Streamlined due diligence processes by coordinating efforts among stakeholders significantly reducing turnaround times.
- Supported drafting of transaction documents complying with regulatory necessities and client demands.
- Guided junior analysts sharing knowledge on financial modeling techniques and fostering their professional growth.

LEADERSHIP & AWARDS

- Recipient of Summit Financial Excellence Award for exceptional performance in 2022.
- Recognized by Greenfield Advisors for Outstanding Client Engagement in 2025.

Data Room Management

Pitch Presentation Development

Analytical Reporting

LANGUAGES

English Native

Spanish Proficient

MY CAREER



● Investment Banking
Associate at Greenfield Advisors
(2.5 Years)

● Investment Banking Analyst
at Summit Financial Group (2.5
Years)

EDUCATION

Bachelor's Degree in Finance

University of Illinois at Chicago 🎓 GPA: 3.8 📅 2021 📍 Chicago, IL

Coursework: Corporate Finance, Financial Analysis, Mergers and Acquisitions, Risk Management

CERTIFICATIONS

- Certified Financial Modeling & Valuation Analyst (FMVA) 📅 2023
- Chartered Financial Analyst (CFA) Level I Candidate 📅 2026

TECHNICAL SKILLS

- **Financial Modeling Tools:** Excel, PowerPivot, Tableau
- **Presentation Software:** PowerPoint, Prezi, Google Slides
- **Valuation Methods:** Discounted Cash Flow, Comparable Company Analysis, Precedent Transactions
- **Research Platforms:** Bloomberg Terminal, Capital IQ, S&P CapitalComps
- **Data Management Systems:** SQL, Microsoft Access, Salesforce
- **Documentation Standards:** IFRS, GAAP, SEC Regulations
- **Collaboration Tools:** Slack, Asana, Trello
- **Market Analytics:** Morningstar, Pitchbook, Dealogic
- **Risk Assessment Frameworks:** SWOT Analysis, Monte Carlo Simulation, Sensitivity Analysis
- **Project Management Methodologies:** Agile, Waterfall, Lean Six Sigma

PROFESSIONAL AFFILIATIONS

- Active member of the Finance & Investments Society at University of Illinois.
- Volunteered with Junior Achievement to support youth in financial literacy education.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST