NAME

Address | Phone # | Email | LinkedIn

EDUCATION

Northeastern University, D'Amore-McKim School of Business **Boston, Massachusetts**
Candidate for Bachelor of Science Degree in Economics, Business Administration; Concentration in Finance *Fall 2024*

- **Cumulative GPA:** 3.83/4.00 **| Honors:** Dean's List, Honors Program **| ACT:** 36/36
- **Relevant Courses:** Investment Banking, Strategy in Action, Money and Banking, Mergers and Acquisitions
- **Activities:** Finance for the Community, Club Taekwondo, Entrepreneurs Club

High School Achievements: Valedictorian **|** International Baccalaureate Diploma **|** Founder – ACT Club

WORK EXPERIENCE

PE Fund **Location**
Private Equity Junior Analyst – Generalist, Deal Execution *January 2024 – Present*

- New deal screening responsibilities include SKU analyses, LBO modelling, and market validation / research
- Existing portfolio company responsibilities revolve around proprietary add-on searches and financial monitoring

Selected Transaction Experience:

- *Add-on acquisition of an agricultural inputs business selling liquid fertilizers (Closed, Proprietary)*
  - Prepared external three statement lender model to secure funding and reset covenants; Outputs included projected operating performance, consolidated PF bank EBITDA, and covenant summary with leverage and fixed charge ratios
  - Converted lender model to equity model, adding base, downside, and upside cases alongside detailed returns and synergy summaries for each operating case; bridged bank EBITDA to equity EBITDA for internal covenant schedule
  - Created funds flow based off of SPA with internal, seller, and lender facing views, accounting for tax distributions payable, accrued commissions payable, and off-balance sheet debt; managed dialogue with counsel and lender
- *Platform acquisition of a K-12 risk, compliance, and training SaaS business (Ongoing, Banked)*
  - Synthesized a SKU deck to examine growing / shrinking customers, trended ACV and segmentation, customer and revenue cohorts, seasonality, geographic concentration, cost structure, sales pipeline, and M&A opportunities
  - Reclassified historical P&L to better represent margin profile; utilized customer cube in order to calculate SaaS metrics such as ACV, LTV, and CAC alongside an output displaying logo retention and gross / net revenue retention
- *Platform acquisition of a tech-enabled vendor management platform for auto collateral recovery (Terminated, Banked)*
  - Built IOI model to validate bid with management, downside, underwritten, and constant growth operating cases

Investment Bank **Location**
Investment Banking Analyst – Technology and Services *January 2023 – July 2023*

- Gained exposure to management teams, sell-side strategy meetings, SaaS metrics, and technology
- Significant modelling and client facing responsibilities; responsibilities include churn waterfalls, retention analyses

Selected Transaction Experience:

- *Sell-side financial advisor to a janitorial ERP company on a sale (Terminated)*
  - Created an in-depth analysis of churned customers, drawing attention to logo retention, churn by segment, churn by product type, and churn by reason; Created analysis based off results to present to senior bankers and client
  - Modelled a dynamic cash-out waterfall to illustrate a majority recapitalization, calculating FDSO in the process
- *Sell-side financial advisor to a manufacturing ERP company on an ~$15M transaction (Closed)*
  - Built an operating model to report and predict MRR; utilized a waterfall analysis, gross retention, and churn analysis in order to calculate recurring revenue, build a P&L statement, and project EBITDA
  - Created funds flow, calculating indebtedness, net working capital, FDSO, and overall transaction expenses
- *Sell-side financial advisor to a childcare management software company on an ~$60M transaction (Closed)*
  - Generated operating model inputs through building of balance sheet schedules and headcount summary
  - Developed an in-depth retention analysis that breaks down SaaS ARR, logos, and centers by geography, customer size, and product type; calculated ACV, LTV, CAC, gross dollar retention, and net dollar retention

Growth Buyout Fund **Location**
Private Equity Fund Accountant *January 2022 - June 2022*

- Tied out investment memorandums of acquisitions, gaining exposure to cap tables, SPAs, and sources and uses tables
- Compiled valuation tables for portcos utilizing public comparables; calculated fund Net IRR and portco MOIC
- Independently closed three funds for Q1 22' through the application of advanced accounting skills
- Assisted fund accounting team with updating and reporting consolidated fund statements for FY2021 audits

SKILLS & INTERESTS

Skills: Microsoft Excel, PowerPoint; Salesforce, Pitchbook
Languages: Native, fluent in Hindi; Intermediate Telugu
Certifications: Bloomberg; WSO Financial Modeling, WSO Excel
Interests: Hiking every National Park in the US, Cars (EU, JP imports), Taekwondo, Singing, Weightlifting, Saxophone