



Cassandra Marchese

Investment Banker

CONTACT

+1 (555) 123-4567

cassandra.marchese@email.com

United States, Oak Brook, IL

EDUCATION

2009 - 2011

Master of Business Administration

Kellogg School of Management,
Northwestern University, United
States, Evanston, IL

Concentration: Finance and Strategy

2005 - 2009

Bachelor of Science in Finance

University of Illinois at Urbana-Cham-
paign, United States, IL

Skills

- Investment Strategies
- Loan Origination
- Regulatory Compliance
- Risk Assessment
- Data Analysis

PROFESSIONAL SUMMARY

Highly accomplished Investment Banker with over 13 years of experience in corporate finance, mergers and acquisitions, and strategic advisory services. Demonstrated expertise in structuring complex financial transactions, managing client relationships, and delivering exceptional financial solutions.

EXPERIENCE

Senior Vice President, Investment Banking

2020 - Now

Capital Group, United States, Chicago, IL

- Manage deal origination, due diligence, valuation, and negotiations for transactions ranging from M to B.
- Develop and maintain relationships with key clients, including Fortune 500 companies.
- Successfully closed over 30 deals, contributing to a 25% increase in annual revenue.

Vice President, Investment Banking

2017 - 2019

Capital Partners, United States, Chicago, IL

- Played a key role in sourcing and executing M&A transactions for middle-market clients.
- Enhanced client relationships, resulting in repeat business and expanded service offerings.
- Closed over billion in deal value, earning recognition as a top performer in the firm.

Associate, Investment Banking

2015 - 2017

Global Finance Advisors, United States, Chicago, IL

- Assisted in the preparation of pitch books, offering memoranda, and client presentations.
- Conducted market research and industry analysis to support transaction recommendations.
- Coordinated with senior bankers to manage transaction processes and client communications.

Business Banker

2011 - 2015

Global Finance Advisors, United States, Chicago, IL

- Evaluated and approved loan and credit applications from businesses.
- Structured loan deals that meet the clients' needs while minimizing risk to the bank.
- Monitored existing loan portfolios to ensure compliance with terms and conditions.