

David Smith

Mergers and Acquisitions Analyst

CONTACT

(555) 234-5678

david.smith@gmail.com

United States, Los Angeles, CA

EDUCATION

Bachelor of Arts in Finance

University of California, Los Angeles,
United States, Graduated: May 2019

- GPA: 3.7/4.0
- Relevant Coursework:* Mergers & Acquisitions, Corporate Valuation, Reporting, Advanced Financial Modeling, Investment Banking

Certifications

- Chartered Financial Analyst Level 1-**, CFA Institute – **Passed: June 2020**
- Financial Modeling & Valuation Certification**, Wall Street Prep – Certified: **September 2019**

AWARDS

Employee of the Quarter, JP Morgan Chase, Q4 2020

PROFESSIONAL SUMMARY

Experienced Mergers and Acquisitions professional with a strong background in transaction structuring, financial analysis, and client management. Proven ability to lead cross-functional teams in executing M&A deals, with a focus on maximizing shareholder value.

EXPERIENCE

Mergers and Acquisitions Analyst

2019 - Now

JP Morgan Chase, Los Angeles, CA

- Play a key role in executing over \$1 billion in M&A transactions.
- Lead the financial modeling, valuation, and due diligence efforts for complex mergers and acquisitions.
- Develop comprehensive financial models for mergers, acquisitions, divestitures, and restructurings.
- Provide guidance to senior management on deal structures, tax implications, and strategic fit.

M&A Intern

2018 - 2018

Barclays Investment Bank, Los Angeles, CA

- Assisted senior bankers in preparing pitch decks, client presentations, and financial models for prospective M&A transactions.
- Supported the due diligence process, reviewing financial documents, and coordinating with internal legal, tax, and operations teams.
- Participated in client meetings and contributed to the preparation of materials for strategic discussions with C-suite executives.

SKILLS

Mergers & Acquisitions Strategy	★★★★★
Financial Analysis & Valuation	★★★★★
Due Diligence & Deal Structuring	★★★★★
Client Relationship Management	★★★★★
Post-Merger Integration	★★★★★
Technical Proficiency	★★★★★

PROFESSIONAL ASSOCIATIONS

- Member, M&A Advisor Association**
- Member, CFA Institute**