

Ethan Will

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PROFESSIONAL SUMMARY

Aspiring investment banking professional with practical experience in various aspects of transactions, including mergers and acquisitions, capital offerings, and other financial advisory services for both private and public companies. Known for my entrepreneurial spirit, I excel in interpersonal skills and thrive in fast-paced, high-pressure environments. I bring a high degree of maturity and integrity to the team, along with a positive and hardworking attitude.

EDUCATION

University of Minnesota Duluth – Duluth, MN

Aug 2019 - May 2023

Labovitz School of Business and Economics (LSBE)

Bachelor of Business Administration (BBA) – Financial Markets, Finance

- Relevant coursework: Accounting, Managerial Finance, Corporate Valuations, Investment Fundamentals, Equity Research, Portfolio Management, Financial Modeling

WORK EXPERIENCE

Equity Analyst

Aug 2022 - May 2023

LSBE Financial Markets Program – Duluth, MN

- Actively co-managed The Bulldog Fund LLC, a large cap equity portfolio of roughly 50 companies with an AUM in excess of \$3,000,000
- Performed investment analysis on the TMT sector using a combination of fundamental, technical, and quantitative methods
- Utilized FactSet & Bloomberg data services to construct equity reports, weekly portfolio updates, earnings reports, and financial models for sector holdings
- Leveraged both Macro & Micro economic indicators in addition to company specific factors to help actively co-manage exposure and risk in an effort to generate positive “alpha” for investors
- Participant in the CFA Global Research Challenge 2023

Investment Banking Analyst Intern

May 2022 – Aug 2022

Oak Ridge Financial – Minneapolis, MN

- Supported all aspects of deal execution including origination, preparing pitch materials, CIM drafting, prospectus drafting, managing virtual data rooms, and facilitating deal logistics
- Responsible for developing marketing materials and other client deliverables
- Provided critical support to junior and senior bankers in financial modeling and analysis
- Developed presentation and communication skills through presenting my equity research findings to wealth managers and active participation in client meetings
- Performed weekly M&A and capital market updates
- Transaction experience includes: M&A, fairness opinions, and capital raises
- Industry coverage: financial institutions, consumer, industrial, technology, and healthcare
- Completed summer equity research project covering Allied Gaming & Entertainment (NASDAQ: AGAE) and Celcuity Inc. (NASDAQ: CELC)

SKILLS, EXTRACURRICULAR ACTIVITIES & INTERESTS

- High attention to detail especially while multi-tasking and dealing with complex information
- Strong interpersonal and communication skills, including writing
- Superior time management, organization, and prioritization skills stemming from prior IB experience
- Robust financial modeling skills and understanding of financial statements and accounting principles
- Expert knowledge in Microsoft Office, S&P Capital IQ Pro, and FactSet
- Exposure to programming languages, including HTML/CSS, Python, and VBA
- Treasurer, UMD Investment Club
- Active participant in poker tournaments and chess competitions

References Available Upon Request