



# **NAREIM Resume Book 2020**

More than 130 undergraduate and graduate students studying at 11 schools across the U.S with a focus on real estate and real estate finance



# **NAREIM Jeff Barclay Fellows Class of 2020/21**

Diego Fernandez Brisenio, MIT Center for Real Estate  
Anastasia Gillen, Northwestern University, Kellogg School of Management  
Caroline Girouz, Columbia Business School  
Erika Jobson, Columbia Business School  
Matthew Kukta, University of Southern California, Price-Smith Department of Real Estate  
Jacob Tannenbaum, Cornell University, Baker Program in Real Estate  
Caroline O'Neill, University of North Carolina, Kenan-Flagler Business School  
Kareem Morad, University of Southern California, Marshall School of Business  
Anh Duc Tran, Northwestern University, Kellogg School of Management  
Liz Trautz, Wisconsin School of Business, Graaskamp Center of Real Estate

**PERSONAL STATEMENT:** My early career in Architecture served as preamble to ultimately discovering that my passion for the built environment resonates truly with the practice of Real Estate. This encouraged me to pursue an MSRED at MIT, where I sought the education that would give me the necessary financial skills to make an incursion into the Investments field of Real Estate. In the context of today's crisis, we have an unprecedented opportunity to contribute to shaping and redefining our industry. It is my belief that parties involved can benefit from this evolution of the value-creation process, while helping Real Estate to serve a social mission.

### ACADEMIC:

8.2019 – 1.2021 (PROJECTED)	<b>M.S. IN REAL ESTATE DEVELOPMENT, CLASS OF 2020</b> <b>MASSACHUSETTS INSTITUTE OF TECHNOLOGY</b> <i>Finance Concentration</i> Thesis (in progress): The Impact of Carbon Footprint Assessment in Logistics Real Estate Asset Valuation Extracurricular: <ul style="list-style-type: none"> <li>Theodore S. Bacon Jr. Fellowship</li> <li>Teacher Assistant: 11.431 RE Finance and Investments, Prof. David Geltner</li> <li>MIT REIL Research Assistant</li> </ul>	<a href="https://mitcre.mit.edu">mitcre.mit.edu</a> <b>Cambridge, Mass.</b>
8.2009 – 7.2014	<b>BACHELOR OF ARCHITECTURE</b> <b>UNIVERSIDAD IBEROAMERICANA, CD. DE MÉXICO</b> Thesis Project: <i>Urban Agriculture Building</i> Extracurricular: <ul style="list-style-type: none"> <li>Semester abroad at PUC Rio de Janeiro, Brazil</li> </ul>	<a href="https://ibero.mx">ibero.mx</a> <b>Mexico City, México</b>

### WORK:

6.2020 – 1.2021 (IN PROGRESS)	<b>RESEARCH ASSISTANTSHIP</b> <b>MIT REIL – PROLOGIS INITIATIVE</b> Leading a white paper initiative to assess and compare the environmental impact of traditional and e-commerce retail channels. Requires exploration into the domains of transportation and logistics, and their relationship to industrial real estate, while collecting and interpreting data from Prologis to build a stochastic simulation model. Working alongside the Real Estate Innovation Lab Director and the Prologis Head of Research. <i>Key activities:</i> <ul style="list-style-type: none"> <li>Data and Monte Carlo analysis</li> <li>Assessing of assumptions in prior literature</li> <li>Simulation and interpretation of outcomes</li> </ul>	<a href="https://prologis.com">prologis.com</a> <a href="https://realestateinnovationlab.mit.edu">realestateinnovationlab.mit.edu</a> <b>Cambridge, Mass.</b>
1.2020	<b>FINANCIAL ANALYST – JANUARY IAP</b> <b>CONSERVATORIO S.A.</b> Directed the analysis and built a financial proforma model for a 10M SF mixed-use and mixed-income housing district, as part of the firm's incursion into transportation-oriented development. Research stay jointly with MIT's January Independent Activities Period. <i>Key contributions:</i> <ul style="list-style-type: none"> <li>Financial modeling.</li> <li>Devised affordable and workforce housing pricing strategies.</li> <li>Approach to TOD from an urban economics point of view.</li> </ul>	<a href="https://conservatorios.com">conservatorios.com</a> <b>Panama City, Panamá</b>
11.2018 – 7.2019	<b>PROJECT MANAGER</b> <b>COMMONGROUNDS WORKPLACE</b> Led the firm's expansion into new markets within the United States. Directed development efforts for constructing new coworking spaces in Atlanta, San Diego, Philadelphia and NYC. <i>Key contributions:</i> <ul style="list-style-type: none"> <li>Assessment and evaluation of properties.</li> <li>Selection and coordination of consultant Architect, MEP, and GC.</li> <li>Initiated the schematic design packages and implemented BIM workflow standards.</li> </ul>	<a href="https://cgworkplace.com">cgworkplace.com</a> <b>New York, N.Y.</b>
4.2017 – 10.2018	<b>PROJECT ARCHITECT</b> <b>GENSLER</b> Held an institutional role in establishing the Google account in the NYC office, while also leading other technology firm projects in the city. Participated in strategic office initiatives. <i>Key contributions:</i> <ul style="list-style-type: none"> <li>Design and execution of +300K SF of projected space. Documentation drawings and site supervision.</li> <li>Responsible for MEP coordination, filing with DOB, and filing with NYC Landmark Commission.</li> <li>Led the involvement and outreach between Gensler and the Mexican business network in NYC.</li> </ul>	<a href="https://gensler.com">gensler.com</a> <b>New York, N.Y.</b>
11.2014 – 3.2017	<b>PROJECT ARCHITECT</b> <b>GENSLER</b> Founding member of the Mexico City office. Focus on corporate headquarters projects for financial services firms and large tech firms. Participated in firm-wide projects and leadership initiatives. Conducted training programs.	<a href="https://gensler.com">gensler.com</a> <b>Mexico City, México</b>

### OTHER COURSES & ACCREDITATIONS:

2020	<b>ARGUS ENTERPRISE SOFTWARE COURSE</b>
2020	<b>ENTREPRENEURIAL NEGOTIATIONS – MIT X</b>
2016	<b>LEED AP BD+C #10985702 – USGBCI</b>
2014	<b>REGISTERED ARCHITECT – MEXICO MIN. OF ED.</b>
	U.S. Work Authorization Eligibility: CPT, OPT, TN Visa

### HIGHLIGHTED PROJECTS:

CommonGrounds: San Diego (20k SF), Atlanta (15k SF), Philadelphia (18k SF).  
 Google NYC: 315 & 345 Hudson St. (300k SF), 111 8<sup>th</sup> Ave (30k SF).  
 Chaincode Labs (20k SF), Hulu (20k SF), Trepp (20k SF), AT&T México (300k SF).  
**SOFTWARE:** Argus Enterprise, Microsoft Office, Autodesk Revit, R Studio  
**LANGUAGES:** Spanish, English, Portuguese  
**SIDE INTERESTS:** Photography, Game Theory, Stoic Philosophy

# Anastasia Gillen

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## EXPERIENCE

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### **Redwood Capital Group, Chicago, Illinois**

#### ***Senior Associate – Asset Management; April 2017 - Present***

- Responsible for managing a portfolio of 11 value-add and core-plus multifamily assets (3,200+ units; \$570M valuation) located in Illinois, Minnesota, Nebraska, North Carolina, and Texas. Assets are owned as joint-venture partnerships with high net worth clients and large institutional clients including Blackstone/LivCor, Investcorp, State Street and Oaktree Capital
- Execute value-add strategies to drive NOI growth, including amenity and unit interior upgrades and property repositioning. Specific responsibilities include monitoring the return on cost of unit upgrades, managing draw requests and change orders and oversight of construction progress
- Produce quarterly and annual client reports, including annual budgets and business plans, hold/sell analyses and valuations
- Prepare monthly and quarterly distribution and capital call recommendations for investment partners by evaluating each asset's cash position on a monthly basis through cash forecast models
- Complete financial analyses, including internal valuation models and cash flow projections, joint-venture waterfalls, hold/sell analyses and sensitivity analyses to recommend asset repositioning or disposition strategies to optimize portfolio returns
- Work with the acquisitions team on new acquisitions including due diligence, underwriting assumptions and market analysis
- Responsible for training the asset management portfolio analyst and facilitated the creation of a new unit renovation tracking system
- Facilitated Redwood's first property transition to in-house property management on an 800-unit portfolio in Minnesota while assisting in identifying areas to improve transitions, leasing, operations and customer service
- Created a template to automate and streamline the quarterly reporting process for all assets in the Company's portfolio
- Assisted in the disposition process of five assets in 2019 and 2020 with sales totaling \$275M by gathering due diligence documents, selecting and working with the respective brokerage companies, fielding all broker and buyer questions, scheduling visits and preparing prorations among other tasks

### **LaSalle Investment Management, Chicago, Illinois**

#### ***Financial Analyst; June 2015 - April 2017***

- Supported the asset management of office, multifamily, industrial, retail and mixed-use assets throughout the country to ensure optimal performance for the company and its investors
- Produced portfolio level financial models used to estimate returns and projected cash flows for the company's primary value-add vehicle
- Drafted investment memoranda's and financial analyses, reviewed capital market materials and facilitated due diligence for property dispositions totaling \$1 billion
- Valued over \$500 million in commercial office real estate primarily focused in West Coast markets ranging from value-add, ground-up development and large-scale redevelopment opportunities using internal excel models, ARGUS, site visits, market data, and broker relationships
- Underwrote and completed due diligence for multifamily and office acquisitions and financings
- Engaged with lenders on loan approvals, loan covenants and draws in order to meet reporting requirements and maximize property cash flows
- Developed annual budgets for properties and tracked performance throughout the year
- Evaluated costs and benefits of potential capital improvement projects
- Produced quarterly investor reports and assisted in external fundraising materials
- Selected to record North American Investment Committee meeting minutes noting major details of investment decisions

### **Gilbane Development Company, Providence, Rhode Island**

#### ***Real Estate Summer Analyst; June 2014 - August 2014***

- Assessed market data trends and conducted research on specific real estate markets, competitiveness of comparable properties and risk presented by new supply for prospective new developments
- Analyzed construction cost comparisons for existing and proposed developments using Excel and created reports for use in department meetings

## EDUCATION

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### **Northwestern University – Kellogg School of Management, Chicago, Illinois**

#### ***Master of Business Administration (MBA), Expected Completion: 2023***

### **Brown University, Providence, Rhode Island**

#### ***Bachelor of Arts in Political Science, 2015***

- Four Year Division I Women's Soccer Athlete
- Course curriculum included Economics, Statistics, Calculus and Real Estate courses

## LEADERSHIP EXPERIENCE

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### **Chicago Construction and Real Estate Council – Building Hope Board (City of Hope), March 2016 - Present**



- Sponsorship chair and board member of Building Hope's Chicago-based chapter, facilitating fundraising activities for lifesaving research in cancer, diabetes and HIV/AIDS at City of Hope, a renowned cancer hospital
- Supported the Board in raising over \$1,000,000 in sponsorships over a three-year period

**Brown University Varsity Women's Soccer, August 2011 – May 2015**

- Four Season Varsity Starter
- 2014 Academic All-Ivy Award; 2012 and 2013 Second Team All-Ivy Honors
- 2013 NEWISA All New England First Team for Division I Women's Soccer
- Recipient of the 2013 Dobson-Kay Coaches' Award, chosen by the coaching staff for outstanding contribution, dedication and sportsmanship

**MEMBERSHIPS**

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**Chicago Construction and Real Estate Council – Building Hope Board (City of Hope), March 2016 - Present**

**Urban Land Institute (ULI) – Chicago Young Leader, July 2015 – Present**

**Real Estate Finance Forum Member (REFF), July 2017 – Present**

**Redwood Capital Group Charity Committee, April 2017 – Present**

**TECHNICAL SKILLS**

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Proficient in Excel, ARGUS Enterprise, ARGUS DCF, Microsoft Word, PowerPoint, Proforma modeling, CoStar, Yardi and RealPage Asset Optimization Platform (including Yieldstar, Axiometrics and Business Intelligence)

## EDUCATION

**COLUMBIA BUSINESS SCHOOL**  
MBA, Real Estate Fellow

New York, NY  
2020-2022

**CORNELL UNIVERSITY**

BA, Psychology; Minor in Business, May 2015. Cumulative GPA: 3.6. SAT: 2220.

Ithaca, NY  
2011-2015

*Leadership/Study Abroad:* Peer Advisor (College of Arts & Sciences); Student Counselor (Empathy, Assistance and Referral Services - EARS); Delta Gamma; Danish Institute for Study Abroad. *Internships:* American Heart Association, Viacom, EY.

## EXPERIENCE

**ORCHARD**

*Leading real estate tech startup that simplifies how people buy and sell homes; employee #54 (now 200+).  
Series B funding led by FirstMark Capital, Accomplice and Juxtapose.*

New York, NY  
2019-2020

**Investment Product Lead** (February 2020 – July 2020)

- Product manager for all valuation-related product enhancements, managed 3 development and design resources. High impact initiatives include development of a deal analysis platform and an active inventory management platform.
- Lead analyst for Dallas-Fort Worth market responsible for reviewing, reporting on, and improving market metrics, tracking market trends, reviewing all home offers, and weekly analysis of active inventory performance.
- Developed insights for continuous improvement of valuation methodology and strategy, presented to executive team monthly.
- Managed 2 junior analysts in underwriting, valuation theory, and investment operations.

**Investment Analyst** (February 2019 – January 2020)

- Responsible for valuation and underwriting of assets from pre-acquisition to resale, while teaming with sales and real estate operations to ensure underwriting attainment. Underwrote and offered on 3,000+ homes.
- Initiated 3 market launches in Dallas/Fort Worth, Austin and Denver from a market analysis and underwriting perspective and contributed to market launch strategy and 12-month roadmap.
- Collaborated with Business Development team to maintain and build relationships with 6 single-family rental companies.

**EY**

**Advisory, Senior Consultant (2017-2019); Staff Consultant (2015-2017)**

Advised clients on management-level strategic, financial, and operational challenges across industries and business functions. Specialized in organizational transformation and strategic change management.

New York, NY  
2015-2019

*Sample Project and Leadership Experience:*

- **Project Management and Operations – \$200Bn Pharmaceutical Corporation:** Managed core client relationships and daily onsite project operations independently on behalf of project leadership. Conducted stakeholder interviews with client leads to identify workstream functions, goals and challenges. Designed and managed development and implementation of an internal physician resource website used as a central hub for program updates, upcoming event details, and training materials. Planned and coordinated three global events involving 1,500 employees across 10+ teams in 75+ countries.
- **Financial Operating Model Change Management – \$4Bn Financial Services Firm:** Developed, budgeted, and planned a change management initiative to support rollout of a financial operating model transformation program designed to achieve EPS growth with respect to operating margin across organization. Advised client leadership in development of a change management roadmap to engage the organization by building enthusiasm while identifying and mitigating risks. Developed communications plan to guide transformation rollout using information from interviews with 30+ client stakeholders.
- Led a study in collaboration with EY, LinkedIn, and Advertising Women of New York, to derive insights on female representation in leadership positions across media, advertising, and entertainment industries; results presented by EY during Cannes Lions and New York Advertising Week.
- Managed financial model used for client billing and invoice generation. Led contract renewal process for 5 active engagements.

## ADDITIONAL INFORMATION

*Certifications:* STEM, three-year OPT eligible.

*Volunteer Work:* Junior Board Member, Futures & Options, an organization empowering NYC's underserved youth to explore careers through career development and paid, mentored internships; Alumni Interviewer, Cornell University.

*Interests:* Enjoy skiing, tennis, live music, new restaurants, traveling, and real estate.

**EDUCATION****COLUMBIA BUSINESS SCHOOL****MBA**, Real Estate and Finance, May 2022*Membership:* Real Estate Association, Private Equity Club, Columbia Women in Business, Hermes Society, Wine Society

New York, NY

2020-2022

**CORNELL UNIVERSITY****BA**, Major in Government & French, Minor, Real Estate, May 2016*Honors:* ULI & Wells Fargo Merit Scholarship Recipient*Internship:* Acquisitions Summer Analyst at Harrison Street Real Estate Capital*Membership:* Mutual Investment Club Real Estate Director, Cornell Real Estate Club, Delta Delta Delta VP Finance, Varsity

Women's Rowing Team (Coxswain)

Ithaca, NY

2012-2016

**EXPERIENCE****META HOUSING CORPORATION***Developer and owner/operator of affordable housing with \$1B in assets and \$1B pipeline***Development Project Manager**

Los Angeles, CA

2016-2020

*Financial Modeling & Analysis*

- Underwrote over \$200MM in multifamily, affordable, tax credit financed development opportunities and managed proforma financial analyses for existing deals, including development budgets, cash flow projections, and tax credit modeling
- Solved \$3.5MM financing gap through workouts and negotiations with lenders and agencies, converting project experiencing \$4.5MM in cost overruns to \$1.4MM in profit
- Managed full profit and loss responsibility for development projects including developer fee, tax credit equity modeling, and debt sizing and repayment analyses, generating over \$15MM in developer fee income and delivering over 500 units
- Sourced and researched project financing, managing internal team to prepare public financing applications, raising over \$80MM in public funds across six deals
- Negotiated 100% waiver of tax credit timing adjuster (late project delivery penalty fee) with equity investor, saving \$600K in late project delivery penalty fees

*Deal Management*

- Oversaw development pipeline of \$140MM in ground-up, multifamily, affordable housing deals from cradle to grave
- Managed project team inclusive of investors, lenders, attorneys, design and construction team, regulatory stakeholders, and junior reports
- Selected by Meta's President to spearhead critical \$26MM new development opportunity in Pismo Beach, CA, including land acquisition, securing entitlements and financing, managing City relations, presenting to City Council, and determining proforma economic feasibility
- Oversaw complex environmental remediation process for 46-unit deal in Carson, CA, navigating changing public environmental regulations to save 20% in remediation costs
- Closed construction and permanent financing for existing deals
- Engaged in stabilization and leasing of assets, overseeing property management team
- Youngest to be promoted to PM in company history, a role which involved full ownership of underwriting, investor and lender relations, running financing closings, managing all consultants and the pre-con/construction process, and four internal direct reports

**ADDITIONAL INFORMATION***Certifications & Skills:* Excel (REFM, A.CRE Accelerator), Argus (October 2020)*Membership:* Urban Land Institute – Young Leaders Group, Partnership Forum, & Women's Leadership Initiative*Volunteer Work:* Cornell Club of Los Angeles – Board Member & Networking Chair, Cornell Alumni Admissions Ambassadors*Interests:* Mentoring (Saturday Business Academy), running (Chicago half marathon, NYRR), wine (WSET Level 1-2, Level 3 in progress)

**EDUCATION**

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**UNIVERSITY OF SOUTHERN CALIFORNIA, SOL PRICE SCHOOL OF PUBLIC POLICY**, Los Angeles, CA **2020 – 2021**  
Candidate for Dollinger Master of Real Estate Development (MRED), May 2021. Overall GPA: 3.93

**RICE UNIVERSITY, JONES GRADUATE SCHOOL OF BUSINESS**, Houston, TX **2015 – 2017**  
Master of Business Administration (MBA), Finance and Real Estate Concentration  
Finance Club, Real Estate Club, Energy Club, Veterans in Business Association (VIBA)

**ARIZONA STATE UNIVERSITY**, Tempe, AZ **2006 – 2010**  
Bachelor of Science, Political Science  
United States Army Four-Year Full Scholarship, Joanne Palmer Academy of Finance Scholarship

**EXPERIENCE**

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**CITIGROUP, Banking, Capital Markets and Advisory**, Houston, TX **2018 – 2020**  
**Investment Banking Senior Associate**

- Provided M&A and capital markets advisory services to oil and gas companies across oilfield services, midstream and upstream verticals
- Designed, built and maintained comprehensive financial analyses and models including discounted cash flow, net asset value, IPO valuation, precedent transactions and comparable company analysis
- Prepared internal, client, and client external materials including internal commitment committee, fairness opinion committee, ratings agency, investor presentation, roadshow and various other sell-side and buy-side process materials
- Conducted regular interactions with corporate executive management and board members to discuss deal and pitch initiatives

*Selected transaction experience:*

- Sole buy-side advisor and acquisition financing provider on Transocean's \$2.7B acquisition of Ocean Rig
- Sole financial advisor to Keane Group in \$1.8B all-stock merger of equals with C&J Energy Services
- Sole sell-side advisor to Superior Energy Services in \$74M land drilling rig service line divestiture
- Lead left bookrunner on a \$750M high-yield offering for Transocean

**DEUTSCHE BANK SECURITIES, Corporate and Investment Bank**, Houston, TX **2017 – 2018**  
**Investment Banking Associate**

*Selected transaction experience:*

- Sole sell-side advisor on \$268M privately negotiated sale of Paragon Offshore to Borr Drilling
- Lead left bookrunner on cross-border CAD\$250M high-yield offering for Tervita Corporation

**Investment Banking Summer Associate** **Summer 2016**

- Prepared pitch books and assisted on advisory & capital markets transactions for upstream, midstream, downstream & oilfield services

**UNITED STATES ARMY, 3rd Cavalry Regiment**, Nangarhar Province, Afghanistan **2014 – 2015**

**Lead Advisor, Afghan National Police Public Affairs & Afghan Air Force Jalalabad Air Operations Detachment (JAOD)**

- Created first Afghan National Police public affairs program in Afghanistan; strategically advised Afghan Police on budget development, training program and equipment procurement process
- Served as Senior Advisor to JAOD Commander; transitioned JAOD from conducting limited joint air operations to unilateral air operations
- Rated by supervisor as top 15% of all officers evaluated

**UNITED STATES ARMY, 69<sup>th</sup> Air Defense Artillery Brigade**, Al Udeid Air Base, Qatar **2012 – 2013**  
**Brigade Assistant Operations Officer / Battle Captain**

- Developed battle & movement documents to improve tracking process that were adopted as new standard by Army Central Command
- Rated top Lieutenant out of 93 Lieutenants, best battle captain in brigade while most junior in rank and among top 5% of all officers on brigade staff

**UNITED STATES ARMY, Alpha Battery, 1-44 Air Missile Defense Battalion** **2010 – 2012**  
**Battery Executive Officer**, Fort Hood, TX

- Developed new supply program reducing shortages by \$300K, all while in absence of supply sergeant
- Rated as best Lieutenant in battery, one of the top three Lieutenants in battalion out of 30 and among top 10% of peers

**Platoon Leader / Shift Officer in Charge**, Ali Al Salem, Kuwait

- Tasked with training, welfare, and discipline of 16 non-commissioned officers, 21 enlisted soldiers, and accountability and maintenance of \$120M worth of Patriot missile equipment, resulting in zero safety incidents and 100% property accountability
- Achieved crew certification in less than half the required time and was in the second of 14 crews to certify to wartime standard

**ADDITIONAL INFORMATION**

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**Certifications:** Series 79, Series 63, United States Top Secret Clearance

**Activities and Interests:** Travel, Recreational Sports, Fitness, Los Angeles Dodgers

# Kareem M. Morad

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## EDUCATION

### University of Southern California

Los Angeles, CA

*Dollinger Master of Real Estate Development*

May 2021

- Relevant Coursework: Real Estate Finance; Mixed-Use Development; Design; Entitlement; Project Management & Construction; Market Analysis; Real Estate Law

### University of Connecticut

Storrs, CT

*Bachelor of Arts, Sociology*

Dec 2013

- Scholar Athlete; Member of Men's Soccer Team

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## EXPERIENCE

### Moran & Company

Irvine, CA

*Senior Associate*

2019-2020

Performed market and asset level analysis for over \$2B worth of institutional multifamily and mixed-use investments and developments.

- Built pro-forma financial forecasts used to raise equity on a \$150M mixed-use development in Downtown San Diego for the sponsor.
- Underwrote assets and developed investment memoranda for institutional firms.
- Clients included: Alliance, Cisterra, Holland Partners Group, MetLife, Prudential, Avalon, Greystar, Invesco.

### 1523 N Van Ness LLC

Santa Ana, CA

*Owner*

2015 – 2018

Created a real estate firm focused on repositioning distressed multifamily in Southern California.

- Underwrote, negotiated and acquired 2 multifamily assets with seller-financing.
- Managed acquisitions, tenants, construction and dispositions. Legalized and fully-permitted the properties.
- Secured bridge financing leading to combined projects yielding a levered IRR of 38%. Completed business plans 4 months ahead of schedule.

### New Western Acquisitions

Los Angeles, CA

*Director of Acquisitions*

2014 – 2018

- Acquired over 150 value add assets, with projected IRR's of 15%-25%, by cold calling owners, establishing relationships with brokers and networking with industry professionals. Profited over \$2M through arbitrage.
- Underwrote investment opportunities including single family redevelopment, multifamily development, RTI entitled land and vacant commercial land.
- Led a team of associates that collectively acquired over \$250M of distressed and underutilized assets.

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## ADDITIONAL INFORMATION

*Languages:* Fluent Arabic, Proficient Spanish

*Professional Affiliations:* Urban Land Institute, CA DRE Brokers License

*Computer Skills:* Proficient in Microsoft Excel, ARGUS

# CAROLINE O'NEILL

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(843) 696-8989  
linkedin.com/in/caroline-oneill21

## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2021  
**Master of Business Administration**, Full-Time Program

- Concentration in Real Estate
- Dean's Fellows Program, Dearborn Family Fellowship in Real Estate, Forté Fellow – Partial Tuition

**UNIVERSITY OF GEORGIA** – Athens, GA May 2011  
**Bachelor of Business Administration**, International Business (Economics), Spanish (Minor)

## EXPERIENCE

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**KFBSF Real Estate Funds** January 2020 - Present  
**Lead Fund Manager**, Chapel Hill, NC

- Manage day-to-day operations of the student-run real estate private equity funds, including identification and evaluation of investment opportunities, asset management, investor relations, and quarterly reporting
- Lead asset manager for seven real estate assets totaling \$1.7M of the Funds' equity investments

**COWAN NAKIOS GROUP LLC** Summer 2020  
**Summer Associate, Investments**, Charleston, SC

- Underwrote the acquisition of an affordable multifamily developer with a five-property portfolio totaling 1,300 units in the Southeastern U.S., including analysis of the Low-Income Housing Tax Credit program
- Supported transaction due diligence and closing processes by coordinating with principals and legal counsel to review property financial statements, limited partnership agreements, and development services agreements
- Evaluated strategic alternatives for the development of owned land parcels, including the development of office, market-rate and affordable multifamily, and for-sale and for-rent townhomes

**WELLS FARGO & COMPANY** 2011 - 2019  
**Assistant Vice President, Real Estate Banking**, Washington, D.C. (2016 - 2019)

- Executed \$330M in office, multifamily, and self-storage construction and acquisition loans for institutional and private real estate developers and underwrote an additional \$900M+ in potential loans
- Closed significant transactions including: a \$70M partial recourse, construction loan for a self-storage facility in Brooklyn, NY and a \$26M full recourse, speculative office construction loan in Annapolis, MD
- Managed relationships with two private developers with total loan commitments greater than \$240M

**Relationship Manager, Seniors Housing Finance**, Washington, D.C. (2015 - 2016)

- Reported on property performance for six construction, acquisition, and redevelopment loans for seniors housing developers, investors, and operators totaling \$150M (25% of team portfolio)
- Researched market and demographic trends impacting demand for senior communities, competitiveness of existing comparable properties, and historical performance of community operators

**Associate, Credit Management Training Program**, San Francisco, CA (2015)

- Performed credit analysis, including financial statement analysis, financial modeling, industry and risk evaluation, debt structuring, and management assessment, through case studies

**Financial Analyst, Commercial Banking**, Jacksonville, FL (2014 - 2015)

- Analyzed financial performance, repayment sources, key risks, industry trends, and management in the underwriting of credit facilities for borrowers with \$20M-\$500M in annual revenue in various industries
- Authored 50+ comprehensive credit reports for new and existing relationships consisting of cash flow loans, formula lines of credit, and real estate secured term loans

**Analyst/Senior Analyst, Commercial Strategies**, Jacksonville, FL (2011 - 2013)

- Conducted industry research and performed financial modeling, including working capital and debt capacity analysis, to enable commercial bankers to have strategic dialogue with prospects and customers

## ADDITIONAL

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- Extreme Teamwork Award, Wells Fargo Commercial Strategies Group
  - Interests: International Travel, Indoor and Beach Volleyball, Skiing

**JACOB D. TANNENBAUM**

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<https://www.linkedin.com/in/jacob-tannenbaum/>

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**EDUCATION**

**CORNELL UNIVERSITY**

*Candidate for Master of Professional Studies in Real Estate, Baker Program*

Ithaca, NY

May 2021

**TEXAS A&M UNIVERSITY**

*Bachelor of Landscape Architecture; Minors in Business and Urban Planning*

College Station, TX

May 2014

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**RELEVANT PROFESSIONAL EXPERIENCE**

**APJ / PROFESSOR T'S - AQUAPONICS**

*Business Development, Strategy, Deal Structuring, & Finance*

Ithaca, NY

May 2020 – August 2019

- Startup aquaponics company that develops large scale facilities for the cultivation of fish, fruit, vegetables, and energy through symbiotic systems, digital monitoring and automation, and controlled environment agriculture.
  - Utilizing a strategy of diverse vertical and horizontal integrations, I worked on prominent projects such as a 16 acre, \$25m controlled environment farm in Florida, a \$18m futurist greenhouse in Saudi Arabia, and the reimagining of Rikers Island, NY as it transitions from prisons to a technologically-innovative, sustainable, equitable, local-food production community for a resilient New York City.

**TANNENBAUM DESIGN GROUP**

*Owner / Principal Landscape Architect*

Denver, CO & Houston, TX

May 2014 – August 2019

- Startup landscape architecture venture focused on large-estate, multifamily, and single-family designs and implementations.
  - Developed customized designs that met the unique needs of diverse clientele and demands of the local environments.
  - Coordinated the production of theoretical designs to fruition through the negotiation with, and management of, various consultants, achieving highly regarded final products.
  - Collaborated with multiple landscape architecture firms and general contractors to develop a network of industry relationships and create new, consistent streams of revenue for the business.

**GREENSPOT REAL ESTATE**

*Real Estate Broker*

Denver, CO

January 2017 – August 2019

- Residential real estate purchases and sales.
  - Collaborated with a sustainably oriented firm to develop a brokering concept of adding more value to the property, through sustainable landscape design and installation than is lost on construction and commissions.
  - Learned the complexities of the housing industry hands on through the facilitation of residential sales.

**EDSA**

*Landscape Architect*

Fort Lauderdale, FL

May 2014 – January 2015

- Landscape architecture and planning work focused on large-scale master planning and resort designs.
  - Conducted various elements of the master planning and landscape architecture design process for resorts and large-scale developments in Central and South America. Notable projects include Four Seasons Hotels – La Reunion, The Park Hyatt Resort at Iguazu Foz in Brazil, The Ritz Hotel in Puerto Los Cabos, Mexico. The Dreams Hotel at Buenaventura in Colombia. The Sotileza Development in Punta Mocoli, Ecuador, Serena del Mar Hospital in Mexico, and the Costa Jama Golf Course and Resort in Ecuador.

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**Extracurricular**

Licensed Colorado Real Estate Broker, ArcGIS, Raymond Ideas Challenge – Invention Competition Winner; Teaching Assistant - Urban Design; Eagle Scout; Denver Startup Week (4); Presidential Volunteer Service Award (3)

**ANH DUC TRAN, CFA**  
1516 Hinman Avenue | Evanston, IL 60201  
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## EDUCATION

2019-present	<b>KELLOGG SCHOOL OF MANAGEMENT AT NORTHWESTERN UNIVERSITY</b> <i>Candidate for Master of Business Administration degree, June 2021</i> <ul style="list-style-type: none"><li>• Majors: Finance, Strategy, and Management Science. GPA: 3.9 / 4.0. Dean's List for Fall &amp; Winter Quarters 19</li><li>• Executive: Real Estate Club; Member: Private Equity Club, Investment Management Club</li><li>• Fund Manager at Kenny Fund, a part of Northwestern Endowment, in the Asset Management Practicum</li></ul>	Evanston, IL, US
2011-2015	<b>NATIONAL UNIVERSITY OF SINGAPORE</b> <i>Bachelor of Science in Real Estate (Honors), June 2015</i> <ul style="list-style-type: none"><li>• Majors: Finance and Management; GPA: 4.3 / 5.0; Graduated with honors; GMAT: 770</li><li>• Scholarship: ASEAN Undergraduate Scholarship Recipient (full-tuition scholarship awarded on academic merit)</li></ul>	Singapore

## EXPERIENCE

2020	<b>EQUITY INTERNATIONAL</b> <i>Private Equity MBA Intern</i> <ul style="list-style-type: none"><li>• Analyzed and valued an investment opportunity in the Asia logistics industry and provided recommendations</li><li>• Developed an investment thesis on the real estate logistics and cold storage sectors in Canada and identified investment opportunities in both public and private markets</li></ul>	Chicago, IL, US
2020	<b>GENERAL PACIFIC CAPITAL</b> <i>Private Equity MBA Summer Intern</i> <ul style="list-style-type: none"><li>• Develop an investment thesis on the logistics and warehouse services sector and identify lower middle-market targets for acquisitions. Analyze CIMs and evaluate investment opportunities</li><li>• Develop and manage a network of trusted advisors (bankers, CPAs, etc.) to aid the proprietary search process</li></ul>	Idaho, US
2018 – 2019	<b>MAPLETREE INVESTMENTS</b> <i>Leading Real Estate Investor in Southeast Asia with 19 years of investing experiences and \$40 billion in AUM</i> <b>Senior Executive Analyst, Investment and Asset Management</b> <ul style="list-style-type: none"><li>• Led a team of four analysts responsible for monitoring and reporting on macroeconomic and market movements of Southeast Asian countries. The team identified opportunities and presented to management monthly</li><li>• Developed investment proposals for two office opportunities in Hanoi, Vietnam worth \$350 million in total, and one \$250-million mixed-use commercial complex in Makati, the Philippines<ul style="list-style-type: none"><li>○ Conducted analysis on the performance of market and comparables</li><li>○ Developed 10-year cash-flow models with three scenarios</li><li>○ Conducted commercial and physical due diligence</li><li>○ Presented investment cases to the investment committee</li></ul></li><li>• Managed a team of 20 property managers and suppliers on an asset-enhancement initiative for a 25-story office-hotel complex in District 1, Ho Chi Minh City, improving building occupancy to 95%</li><li>• Developed and managed research databases for properties in Vietnam and the Philippines, enabling senior management to efficiently access information on pricing, comparables, and future supply</li></ul>	Singapore
2015-2018	<b>JONES LANG LASALLE</b> <i>Senior Analyst, Corporate Solutions</i> <ul style="list-style-type: none"><li>• Produced research on three APAC sectors to support business development efforts. Developed financial models and real estate portfolio analyses to advise 18 clients on strategic operational and investment decisions</li><li>• Built 13 prospective client profiles, including insights on clients' key strategic and operational needs. Led to nine global and regional wins and improved 2017 new sales by 25% year-on-year</li><li>• Supported regional Heads of Sales and Account on business development initiatives, resulting in 20 new clients and expanded businesses with 40 clients, generating \$40 million of gross profits in new sales</li><li>• Initiated and developed a central database for the department, built analytic reports that enabled management to review performance and strategize for growth</li></ul>	Singapore

## ADDITIONAL DATA

- Chartered Financial Analyst (CFA) since 2019
- Technical Director of Glory Avenue musical production in Vietnam in 2012. Led 40+ artists and volunteers over a period of four months. Performed five nights with a total audience of 1,200 and won critical acclaims
- Interests: soccer, tennis, traveling, reading about history



# LIZ TRAUTZ

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## EDUCATION

### University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI

2020 – 2022

*Master of Business Administration Candidate; Real Estate Specialization*

- Key Coursework: Real Estate Finance, Real Estate Valuation, Argus and Excel Modeling, Financial Management, & Data to Decisions
- Recipient: Forte Fellowship
- Selected as 2020-2021 Goldie Scholar
- GMAT: 690

### Colgate University, Hamilton, NY

2013 – 2017

*Bachelor of Arts*

- Major: Economics & Spanish
- NCAA Division I Women's Ice Hockey
- CIEE Spanish Immersion in Buenos Aires, Argentina
- Dean's Award for Academic Excellence

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## PROFESSIONAL EXPERIENCE

### Colliers International, Chicago, IL

09/2018 – 05/2020

*Investment Sales Marketing Coordinator*

- Directed marketing of commercial properties as part of top industrial sales team in Midwest, generating \$600 MM in annual sales
- Initiated new team projects and improved previous marketing efforts to further promote properties; including launching team website, revamping buyer tracking, and organizing large industry events; resulted in increased buyer pool
- Enhanced team's client relationships by implementing and customizing new customer database and keeping clients up to date on team activity
- Collaborated with senior brokers and financial analysts to execute deals by creating Offering Memorandums and Broker Opinion of Values; analyze letters of intent, abstract leases, and prepare sale comps to help facilitate building sales
- Selected as one of 200 mentees for Colliers Women's Diversity Program

### Colliers International, Chicago, IL

11/2017 – 09/2018

*Property Administrator*

- Managed portfolio of 20 industrial and office buildings under guidance of senior property manager, totaling over 4,500,000 square feet and 17 tenants, for several institutional investment companies
- Assisted in formulating yearly property budgets, totaling \$1 MM each in expenses and a combined \$4 MM in CapX
- Produced monthly financial reports, attended building tours, delivered rent statements, created service contracts, tracked insurance, and oversaw building inspections in order to maintain steady building operations
- Ensured tenant satisfaction by establishing and coordinating strong relationships with maintenance staff, contractors, and tenants
- Managed accounts payable and collaborated with property accountants to ensure vendors paid and rent received on time; resulted in overall decreased late fees

### Mid-America Real Estate, Minneapolis, MN

05/2016 – 08/2016

*Tenant Representation Intern*

- Interned for top retail broker in Minnesota, who received Broker of the Year Award in 2015
- Prepared lease comparables, letters of intent, marketing packages, maps, aerials, demographics, and other materials for retail clients, contributing to transaction closing
- Investigated ownership of retail properties and cold called business owners, generating additional prospective spaces and new clients
- Executed project leasing tasks, including showings and prospective tenant tracking

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## COMMUNITY INVOLVEMENT

- Salt and Light Coalition – Junior Board Member
- Make-A-Wish Illinois – Wish Granter

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## LANGUAGES AND INTERESTS

- Languages: Spanish
- Yoga instructor – RYT 200-Hour Certification



# University of California, Irvine

# Nolan Carroll

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Email: nrcarrol@uci.edu Phone: 619-504-4015

## EDUCATION

### **Cuyamaca College, Rancho San Diego/ Cumulative GPA 3.6**

August 2018 - June 2020

### **UC Irvine, Irvine/ Cumulative GPA 3.9-*Political Science-Pre Law***

July 2020-June 2022

## EXPERIENCE

### **Higbee & Associates—*Copyright Legal Intern***

October 2020-Present

- Negotiating settlements, litigation procedures, and pre-trial investigation
- Case data research and corresponding with clients and opposing counsel
- Screening cases for missing data

### **Freelance Marketing and Copywriting**

June 2020- Present

- Create Facebook and Google Ads for Small businesses and E-commerce shops
- Optimize website and sales page copy for a multitude of brands
- Market research and the ability to spot marketing trends in different industries

### **YMCA, Rancho San Diego— *Wellness Coach***

June 2019 - Present

- Showcase excellent interpersonal skills by helping members reach their fitness goals
- Responsible for managing the gym area and dealing with any problems that emerge
- Utilized excellent problem solving skills by figuring out fitness needs for different members

## SKILLS

- Proficient in Microsoft Office including Word, Excel, and PowerPoint
- Intermediate Accounting knowledge
- Strong written, verbal and interpersonal communication skills
- Understanding of American Financial Markets and background in stock/option trading
- Proficient in media buying, copywriting and social media marketing

## AWARDS/CLUBS

- Valhalla High School Varsity Tennis Most Valuable Player
- Grossmont/Cuyamaca College Promise Plus Scholarship recipient and Vice President's Honor List
- Hedge fund society at the University of California Irvine and UCI Real Estate Association



# **The University of Chicago Booth School of Business**

## WORK EXPERIENCE

### **CCI – a Henry Crown Company**

**Chicago, IL***Portfolio Manager – Real Estate**October 2016 – Present*

- Involved in all aspects of transactions including sourcing, due diligence, modeling, structuring, and preparation and presentations of investment memorandums to CCI/HCC Investment Committee
- Responsible for monitoring a \$15 B+ portfolio of existing real estate relationships and investments to ensure CCI/HCC investments are meeting or exceeding underwritten projections
- Created and maintained a comprehensive real estate database of CCI's \$15 + Billion real estate portfolio tracking geographies, asset class, investment strategy, returns and partners guiding future investment allocations
- Negotiated joint venture partnership agreements, fund level partnership agreements, side letters, and co-investments agreements alongside legal counsel providing CCI/HCC with favorable terms and investment optionality
- Increased CCI's investment pipeline by sourcing more than \$5 billion of potential investment opportunities and underwriting approximately \$10 B of investment opportunities per annum
- Targeted investment opportunities include REOC, secondaries, development, value add, and core strategies across multifamily, senior housing, student housing, office, industrial, self-storage, and hospitality asset classes

### **Murphy O'Brien/POB Capital**

**Chicago, IL***Associate**June 2015 – October 2016*

- Originated over \$210 million of multifamily, office, and industrial investments located in Chicago, New York, Charlotte, Atlanta, Milwaukee, Washington D.C., and Texas
- Underwrote more than \$750 million of investments in multifamily, office, industrial, and retail assets through value add, development, and structured debt strategies
- Modeled office, retail, and industrial transactions in Argus DCF and created multifamily models in excel including multi-tiered joint venture waterfall structures
- Prepared and presented Murphy O'Brien's detailed investment memorandums to management, fund investors, and prospective investors
- Created and maintained Murphy O'Brien's investor reporting materials and asset level performance reports

### **PNC Real Estate**

**Chicago, IL & Dallas, TX***Analyst-Associate**July 2012 – June 2015*

- Underwrote the acquisition of senior, family, market rate, manufactured, and Section 8 multifamily real estate including more than \$250 million in debt and equity
- Assisted in originating LIHTC equity investments, pre-development, construction period, and permanent financing totaling more than \$200 million in balance sheet debt
- Created and maintained financial models for syndicated debt and equity investments in excess of \$1 billion per annum
- Supported the underwriting of \$150 million of GSE financing specializing in Class A multifamily assets

## EDUCATION

### **University of Chicago – Booth School of Business**

**Chicago, IL***Master of Business Administration**Class of 2021*

### **Northwestern University – Weinberg College of Arts & Sciences**

**Evanston, IL***Bachelor of Arts; Economics**Class of 2011*

## LEADERSHIP

### **Northwestern University Football Team**

**Evanston, IL***4 Year Letterman**Sep 2007 – Dec 2011*

- 4 time Academic All-Big Ten award winner

## OTHER INFORMATION

*Languages:* Basic Skills in Spanish*Modeling:* Training the Street Financial Modeling*Computer:* Expert in Excel, PowerPoint, Word, and Argus Enterprise

# KRISTINA FLATHERS

151 N. Michigan Ave., Apt. #1219, Chicago, IL 60601 | (831) 676-6598 | kflathers@chicagobooth.edu

## EDUCATION

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### THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS

Chicago, IL

*Master of Business Administration, Concentrations in Finance and Strategic Management*

Sep 2019 – Jun 2021

- Real Estate Club (Co-Chair), Catholics at Booth (Co-Chair), Graduate Business Council (Cohort Social Chair)
- Paul & Patricia Purcell Scholarship, Goldie Real Estate Scholars Program, CREW Network Scholar, McKinsey Scholar
- Real Estate Case Competitions: UNC Chapel Hill (Development), ARGUS (Value-Add Acquisition)

### UNIVERSITY OF NOTRE DAME

Notre Dame, IN

*Bachelor of Arts in Economics (Minors in Chinese; Philosophy, Politics, & Economics), Cum Laude*

Aug 2011 – May 2015

- Hesburgh-Yusko Scholarship – 25 chosen from 750+ applicants for academics, character, leadership, and service
- Employed by Alumni Relations as a fundraiser; named Manager of the Year in 2015

## EXPERIENCE

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### BROOKFIELD ASSET MANAGEMENT

New York, NY

*Investments Consultant, Real Estate*

Jun 2020 – Nov 2020

- Assessed various U.S. housing markets to inform Brookfield's daily investment decisions in deploying tens of millions of capital into single-family rental houses; the firm purchased over 600 properties by internship's end

### PFINGSTEN PARTNERS

Chicago, IL

*Associate Intern, Private Equity*

Jan 2020 – Mar 2020

- Pitched and developed investment theses, identified two attractive industrial sub-categories based on firm's criteria
- Conducted diligence on potential investments, analyses on business model, competitors, vendors, and customers
- Analyzed operations for portfolio company supply chains in China affected by Covid-19

### GOGO

Chicago, IL

*Manager, Corporate Strategy*

Apr 2019 – Present

- Developed and drove the strategic planning process for a \$900M P&L in partnership with Finance team, synthesized market trends and competitive intelligence to drive business decisions, ultimately cut costs by \$121M (13%)
- Drove exploration of inorganic acquisition opportunities valued from \$1B to \$4B; identified targets, revenue and cost synergies; presented strategic options to executive team
- Authored two internal books on satellite industry and data consumption; CEO carried to all external meetings

*Senior Analyst, Corporate Strategy*

Feb 2018 – Mar 2019

- Created dashboard for monthly commercial business review meetings, resulting in more efficient cross-team data sharing process; saved overtime expenses by facilitating access to information
- Reprogrammed market share model for Investor Relations team, saved \$70K in contractor fees

### GOLUB CAPITAL

Chicago, IL

*Associate, Underwriting – Healthcare*

Jun 2017 – Feb 2018

- Closed 8 transactions worth \$2B and earned over \$30M in fees for the company
- Spearheaded 6-person, inter-departmental project team to develop and populate in-house database, streamlined process of building data tables of target companies' key metrics, cut related analyst overtime expenses by 20%
- Led diligence calls with external consultants and bankers, allowed senior credit officers more flexibility with their time
- Mentored analyst who was then promoted on expedited basis, saved \$60K in search costs by recruiting two associates

*Analyst, Underwriting – Healthcare*

Nov 2016 – May 2017

- Built financial models and Excel data packets, conducted in-depth analyses on companies, and prepared credit analysis memos to help senior officers determine if a company was credit-worthy of an investment
- Monitored portfolio company financials for performance, reporting mistakes, and debt covenant noncompliance which would potentially lead to payments of over \$500K in penalties to the firm

### JEFFERIES

New York, NY

*Analyst, Investment Banking – Leveraged Finance*

Jun 2015 – Sep 2016

- Closed 5 transactions worth \$3B and earned over \$50M in fees for the company
- Drafted and sent weekly market update email and slides to 1,000+ Jefferies clients on behalf of 11 managing directors across investment banking groups, directly led to 20 incoming debt transactions
- Mentored 10 interns who each received a return offer (compared to 60% company-wide average)

## ADDITIONAL

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- Interest in personal real estate investing, and owner of eight rental properties across two states
- Aid for Women, Inc., 501(c)(3) – Junior Board, promoted to Board of Advisors (Finance and Strategy Committees)
- Santa Catalina School – Chicago Chapter Co-President, promoted to Alumnae Council (Development Committee)
- Interests: Bigger Pockets Real Estate Podcast, languages (Chinese – fluent), piano, presidential biographies, tennis

## DAVID HOOGMOED

151 N. Michigan Ave., Unit #3518 | Chicago, IL 60601 | (616) 295-6223 | david.hoogmoed@chicagobooth.edu

### EDUCATION

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#### THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS

Chicago, IL

*Master of Business Administration, Concentrations in Finance and Strategic Management*

*Sep 2019 – Jun 2021*

- Siebel Scholar, Real Estate Group (Co-chair), Graduate Business Council (Cohort President), Admissions Fellow
- UNC Real Estate Development Challenge; Training the Street Financial Modeling course; GMAT 720 (94th percentile)

#### THE UNIVERSITY OF MICHIGAN ROSS SCHOOL OF BUSINESS

Ann Arbor, MI

*Bachelor of Business Administration*

*Aug 2009 – May 2013*

- Graduated with High Distinction in Finance; Frank S. Moran Distinguished Leadership Award
- BBA Student Council President; Delta Sigma Pi Chapter Operations Vice President

### EXPERIENCE

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#### ASCENTRIS

Denver, CO

*Summer Acquisitions Associate*

*Jun 2020 – Aug 2020*

- Led due diligence efforts across market research, affordable unit requirements, and property taxes for preferred equity investment in \$110M mixed-use development, and prepared and presented investment memo to Investment Committee
- Analyzed and underwrote office, multifamily, retail, and industrial transactions exceeding \$1B value throughout major US markets; deals spanned new development and value-add investments
- Worked with separate account Limited Partner to model expected return of senior debt paydown strategy for their real estate portfolio considering opportunity cost of capital, prepayment penalties, and interest swap contracts on senior debt
- Prepared and presented whitepaper on Covid-19 expected impact to office sector utilization and parking requirements

#### AGMAN PARTNERS

Chicago, IL

*MBA Intern – Private Equity/Venture Capital Lab*

*Mar 2020 – Jun 2020*

- Developed financial model to analyze hold/sell strategy for portfolio of 46 multifamily properties, evaluated properties based on upcoming capital expenditure requirements and return projections to arrive at hold/sell recommendation
- Performed market analysis and completed underwriting, including robust input sensitivity analysis for 141-unit multifamily development that identified need for cost negotiations due to imbalance between construction costs and market allowable rents
- Created market analysis scorecard that compiled CoStar and government data into interactive dashboard which guided deal team toward new secondary Midwest markets for multifamily and office acquisitions

#### ACCENTURE STRATEGY

New York, NY

*Strategy Consultant*

*Sep 2016 – Aug 2019*

- Modeled customer spend behavior to determine revenue and reward cost changes for loyalty program relaunch strategy of U.S. toy retailer resulting in recommendation for richer loyalty rewards that achieved 5% revenue growth from members
- Directed team of analysts and consultants on coordination of pre-integration R&D workstreams and prepared C-suite and board updates for \$74B pharmaceutical acquisition in order to drive successful close and Day 1 operating model
- Launched loyalty program for franchised restaurant by leading franchisee relations and business case creation, which resulted in program reaching over 1M enrollments and contributing to 15% increase in member spend in 6 weeks

*Strategy Senior Analyst*

*Sep 2014 – Aug 2016*

- Improved customer retention of \$5.5B food retailer by strategizing loyalty program concepts and testing viability with consumer research and financial models, resulting in \$118M incremental profit over 3 years
- Conducted digital marketing workshops with pharmaceutical brand owners that explored ways for digital tactics to meet brand goals, leading to new, unbranded website for patient education of metastatic breast cancer

*Strategy Analyst*

*Sep 2013 – Aug 2014*

- Developed list of 30+ CRM tool opportunities for in-home nursing facilitators, resulting in new CRM platform deployment that utilized tablets, reducing post-care documentation time of nurses by 16%

### ADDITIONAL

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- Certifications: ARGUS Enterprise, Kellogg School of Management Leading with Analytics-Powered Strategy
- Avid traveler that has visited 6 continents and pondering how to reach Antarctica before business school graduation
- Frequent volunteer with Habitat for Humanity working with local chapters to build housing for community members

# JUAN COOPER SCHENKE

(312) 687-1442 | [jcooper8@chicagobooth.edu](mailto:jcooper8@chicagobooth.edu) | [linkedin.com/in/juancoopers](https://www.linkedin.com/in/juancoopers)

## EDUCATION

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### THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS

*Master of Business Administration (STEM)*

Chicago, Illinois

Sep 2020 – Jun 2022

- Concentrations in Business Analytics, Strategic Management, and Finance
- Active member of the Booth Technology Group, Booth Analytics Group, Corporate Management Group and Artificial Intelligence Club

### PONTIFICIA UNIVERSIDAD CATOLICA DE CHILE

*Bachelor of Science in Business Administration*

Santiago, Chile

Mar 2010 – May 2015

- Awards: Graduated with distinction, scored among top 1% in final degree examination
- Teaching Assistant: Accounting I & II, Managerial Accounting, Introduction to Economics and Methods of Optimization (2011-2015)
- Exchange Program: University of New South Wales Business School in Sydney, Australia (2014)

## EXPERIENCE

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### MINISTRY OF ECONOMY, GOVERNMENT OF CHILE

*Head Advisor to the Minister in Mining Industry*

Santiago, Chile

Apr 2019 – Aug 2020

- **Built and led team, commissioned with a US\$800k budget** to devise a strategy and implement projects to optimize operations at government agencies involved in the execution of a US\$40bn portfolio of mining projects, most important industry in Chile
- **Generated over US\$50mm in taxes for the Chilean state** in 5 years by conducting research on government strategy in worldwide mining industry, and designing roadmap from conception to implementation of program aiming to expedite the execution of projects
- Reduced time to process selected permits at Health Ministry by 40%, **benefitting 2,000 companies with permits on hold** due to lack of capacity by designing risk matrix to assess need for site visit and working with cross-functional team in roll-out strategy of digitization
- Solved resource management problem at the Ministry of Mining, resulting in **cost saving of \$6mm in 4 years** by convincing stakeholders of modifications to law and its internal structure to allow it to handle workload without increasing the number of workers
- Presented public policies and laws aiming to foster mining investment and conducted interviews to raise industry concerns in three national forums, as **official nexus between government and National Society of Mining**, cluster of all the mining companies in Chile

### BANK OF AMERICA MERRILL LYNCH

*Investment Banking Senior Analyst Latin America Coverage Team*

Santiago, Chile and New York, New York

Jul 2018 – Mar 2019

- Engaged in equity, debt, and M&A transactions across multiple industries, participating in 30+ origination pitches as **only analyst in Chile**
- **Developed Groupon LATAM's turn-around strategy** through the acquisition of 50% of Mobike, a station-less bicycle-sharing system and Pipol, a mobile payments platform; presented market and financial analysis recommendation to board to greenlight investment
- **Achieved 34% price premium** over stock market value in the US\$5.1bn divestment of SQM, the biggest transaction of the Chilean market in 2019, by creating valuation analysis including forecast for lithium price and regulatory overviews of the industry
- **Developed opportunities assessment for LATAM's third largest retailer**, resulting in IPO of selected real estate assets in Chile's largest IPO in history; worked with cross-functional team to define capital structure, determine assets, and prepare marketing materials
- Appointed **LATAM Recruiting Captain** for investment banking interns; shortlisted, interviewed, and mentored intern class of 2018

*Investment Banking Analyst Latin America Coverage Team*

Dec 2015 – Jun 2018

- **Analyzed new avenues for growth for Chile's second largest holding**, resulting in the acquisition of Road Ranger, a convenience store chain in the US for US\$290mm; participated in assessment of market potential, due diligence, and execution of the acquisition
- Created valuation model, offering memorandum and analyst presentation by **analyzing consumption and billing data of 600k customers**, in the divestiture of GasValpo by an Australian Fund Consortium, its gas distribution company in Chile
- Participated in origination and execution of debt issuances totaling more than US\$10bn, for Latin American clients in the airline, banking, retail, and mining industries, among others, including **first green bond product in Chile to tailor particular need of customers**

## ADDITIONAL

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- **Entrepreneurship:** Co-founder of Film&Media investment fund to finance Chilean films raising US\$500k in commitments (2019-Present)
- **Technical Skills:** Proficient in R, SQL, GitHub, Agile and Python and advanced quantitative and financial acumen, including valuations
- **Associate professor:** Accounting II (introduction to costs and financial mathematics) at my Alma mater, Pontificia Universidad Catolica; youngest professor teaching the course (Spring 2020)
- **Community:** Advised companies on strategic plans by volunteering at Conectapym; financial team member of Techo para Mi Pais in its project to construct housing and build public spaces after Chilean 2010 Earthquake
- **Interests:** Writer of short film scripts and huge fan of dark comedy and sci-fi movies. Soccer player, runner (participated in the Santiago 2015 marathon) and high school tennis champion (2007, 2008); rode motorbike from Hanoi to Ho Chi Minh (1,050 miles)
- **Other:** Eligible for special H1B1 working visa quota for Chilean citizens (not subject to lottery)



## Andrew Killian

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(734) 812-4980 | akillian@ChicagoBooth.edu

### EDUCATION

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#### THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS

*Master of Business Administration*

Chicago, IL

Sep 2019 – Jun 2021

- Concentrations in Finance, Economics, and Entrepreneurship
- Co-chair of Booth Real Estate Group & Booth Basketball Club; Member of Government and Policy Club
- Placed 2<sup>nd</sup> in UT Austin 2019 Real Estate Case Competition
- Participant in 2020 ARGUS Case Competition

#### UNIVERSITY OF MICHIGAN

*Bachelor of Science in Business Administration, Minor in Creative Writing*

Ann Arbor, MI

Sep 2010 – May 2014

- Research assistant in coworking industry research
- Completed Strategy course on Sustainable Business at INCAE in Costa Rica (May 2012)

### EXPERIENCE

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#### BEDROCK – Full-service real estate firm focused on downtown Detroit's revitalization

Detroit, MI

*Finance Intern*

Jun 2020 – Aug 2020

- Refreshed full-block mixed-use underwriting model to update construction budget and assumptions, leading to increased return
- Compiled high-level investment summary of Chicago investment project by reviewing investee's model and conducting market research; recommended go/no go on opportunity
- Joined working group that launched broad-based capital raising strategy for the company; tracked data compilation efforts
- Compiled property data, analyzed portfolio, and created visual takeaways to support broader portfolio strategy efforts
- Assisted refinancing of major property and inclusion into bridge financing facility; built tracker to manage refinancing requests
- Analyzed residential operating expense and fit-out spend to determine potential improvement areas in residential efforts

#### NEWELL BRANDS

Chicago, IL

*Associate Manager, Integrated Supply Chain*

Jul 2018 – Aug 2019

- Reduced excess and obsolete inventory (E&O) within Writing division by \$15M gross (35%) in a year's time; built analytical models to improve future E&O visibility and reporting
- Developed analytical process to determine forecasting biases for \$1.8B Writing division, leading to 12% increase in forecast accuracy (\$4M inventory impact)
- Implemented Product Life Cycle Management in Home Fragrance division; reduced Stock Keeping Unit (SKU) count by 50% while maintaining revenue

*Senior Analyst, Transformation Office*

Oct 2016 – Jul 2018

- Facilitated end-to-end design of Brand Development organization of Newell Brands after Jarden merger, mapping over 2,600 positions and achieving \$5.8M in savings
- Supported director in increasing off-price channel sales (e.g., TJX, Ross Discount, etc.); led data analysis and project management, creating \$20M of incremental sales in 2017

#### DELOITTE CONSULTING, LLP

Detroit, MI

*Business Analyst*

Aug 2014 – Jul 2016

- Analyzed operating room data from 23 facilities to assess utilization and efficiency; uncovered \$18M opportunity to increase operational effectiveness
- Assisted with business case creation for chemicals company to expedite post-merger SAP implementation. Conducted interviews, compiled insights, and quantified specific savings, ultimately reinforcing client's move to integrate SAP systems
- Selected as national and local peer leader: Recruiting Lead of National Business Analyst Committee (BAAC) and co-lead of both Community Service as well as Recruiting teams for Detroit office

### ADDITIONAL

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- Member of the Urban Land Institute (ULI) and NAIOP (Commercial Real Estate Development Association)
- ARGUS Enterprise certified
- Avid fiction fan; enjoy reading and writing fiction in my spare time

# NIKO TSIKAS

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## EDUCATION

### THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS

Chicago, IL

*Master of Business Administration, Dean's Honor List*

2018 – 2021

- Concentrations: Finance, Entrepreneurship, Strategic Management
- Workshops: Financial Modeling (TTS), Corporate Valuation (TTS), LBO Modeling (Wall Street Prep)
- Clubs: Soccer (co-chair), Banking (member), Investment Management (member), Consulting (member)

### VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY

Blacksburg, VA

*Master's in Transportation Infrastructure and Systems Engineering*

2014 – 2016

- GPA: 3.96/4.00 (Summa Cum Laude)
- Air Transportation Systems Laboratory Award of Excellence 2016, Graduate Research Assistantship 2015

### ARISTOTLE UNIVERSITY OF THESSALONIKI

Thessaloniki, Greece

*Bachelor's in Civil Engineering (focus: Transportation Infrastructure and Regional Planning)*

2008 – 2014

- GPA: 7.77/10.00, Dean's Honor List (3 semesters), Chair of General Students Club

## EXPERIENCE

### RICONDO, INC. (Chicago, IL) (US Leading Aviation Consulting Firm Serving 80% of US Top 20 Busiest Airports)

*Senior Consultant*

July 2018 – Present

- Established department of advanced analytics; directed team to build firm-specific solutions; realized annual run-rate savings of \$1.2 million (~10%) in data analytics tasks.
- Reorganized selection, interview and hiring process for entry-level roles; coached incoming consultants to enhance their presentation and general consulting skills; reduced average onboarding cost per consultant by more than 20%.
- Spearheaded revenue optimization effort for car rental facilities; identified distribution channels with high conversion rates; created product innovations based on customer insights; boosted year one reservations by 8%.

*Consultant*

July 2016 – June 2018

- Structured an excel and VBA based financial model for revenue bond feasibility analyses; increased efficiency and ensured consistency across different projects, completed studies totaling over \$300 million.
- Introduced a dynamic parking pricing and management model; monitored implementation process; reversed 5-year revenue decline and increased market share by 22% after 12 months.

### AIR TRANSPORTATION SYSTEMS LABORATORY – VIRGINIA TECH (Blacksburg, VA)

*Research Assistant*

January 2015 – June 2016

- Implemented accurate and timely processing of oceanic flight data on R and SQL; refined Federal Aviation Administration's cost-benefit analysis regarding Space-Based Oceanic Investments.
- Led a 5-student product development team; designed prototype for fuel-efficient transatlantic routes saving over \$200 million annually for airlines; negotiated and secured an additional \$500k 2-year contract with the FAA.

### TSIK, INC. (Thessaloniki, Greece) (Food and Beverage Firm Valued at € 4.5 Million)

*Business Strategy Specialist*

June 2013 – July 2014

- Restructured procurement, operations, marketing and staff management of iconic brand; spearheaded business plan; achieved over 10% YoY revenue growth during a period of economic downturn.

### DEP. OF CIVIL ENGINEERING – THESSALONIKI INTEGRATED TRANSPORT AUTHORITY (Thessaloniki, Greece)

*Research Associate*

April 2013 – May 2013

- Organized a qualitative research team of 6 students and researchers; examined applicability of an innovative quality evaluation system; forecasted level of service trends under various socioeconomic conditions.

### DIRECTORATE OF TECHNICAL WORKS – REGION OF CENTRAL MACEDONIA (Thessaloniki, Greece)

*Project Management Intern*

May 2012 – August 2012

- Monitored progress of 2 highway construction projects; ensured project timeline was followed consistently.

## ADDITIONAL

- **Reader:** Read 300+ books in past 15 years; fiction and non-fiction; Most loved: The Last Lecture, Randy Pausch
- **Sports fun:** Soccer; Travelled in Europe to attend soccer games; Most notable trip: World Cup in Moscow, Summer 2018
- **Languages:** Greek (native), English (fluent), French (intermediate)



# **Columbia University and Columbia Business School**

## BRENDAN J. CAVENDER

New York | 201 West 11<sup>th</sup> Street, No. 5F, New York, New York 10014  
Mobile | +1 734 355 9296 Personal | [bicavender@gmail.com](mailto:bicavender@gmail.com)

### REAL ESTATE AND DEVELOPMENT EXPERIENCE

#### Senior Vice President

CB Richard Ellis (CBRE) New York

Jun. 2019 – Present

Partner in a globally focused commercial team, leading to date over 850 complex deals totaling over 7.5M SF of new development and office space. Oversee and develop global real estate strategies and transactions, along with space utilization analysis, for multiple Fortune 500/public companies. Lead negotiation and advisory of complex real estate modeling, and detailed financial analysis.

#### Principal, Creative Director, Janitor

Cavender Companies Ltd.

May 2014 – Present

Have built and grown a small Midwest-based portfolio of historic properties and adaptive reuse projects. Focus on authentic properties in secondary markets. Have led and completed numerous historic redevelopment projects serving as GC, underwriting, financial modeling, and financing. Conservative approach, low-leveraged business model. Directed and led all creative decisions for construction, interiors, historic approvals, and design.

#### Senior Managing Director

Colliers International New York

May 2016 – Jun. 2019

Grew group to number one commercial team for the Americas. Focus was bifurcated between New York and globally. Conceptualized and executed some of the largest and most complex transactions in New York and the Tristate area totaling over \$8B in value. Completed transactions in over 50 countries globally.

#### Partner and Development Consultant

Colliers International Ann Arbor

Jan. 2009 – May 2016

Development consulting and commercial brokerage. Grew the firm to the leading commercial real estate company locally. Consulted on numerous adaptive-reuse projects, oversaw and conceptualized the four largest and most prominent retail and office redevelopments, the formation of the Ann Arbor tech hub, repositioning of over twenty historic CBD properties, and represented several global companies.

### EDUCATION

#### Columbia University in the City of New York

##### Master of Science of Real Estate Development – Candidate (2021)

Cross study between Columbia's Graduate School of Architecture, Planning, and Preservation and Columbia Business School

#### University of Michigan – Ann Arbor

Class of 2011

##### Business Sociology

Created a hybrid concentration combining various aspects of business with sociology and psychology, focusing on how individuals interact in the workplace. Active leader and participant in numerous philanthropic initiatives.

### ADDITIONAL EXPERIENCE AND EXPERTISE

Certified Commercial Investment Member (CCIM) Candidate and Argus Enterprise certified  
Recipient of Michigan Top Young Broker Award, several Deal of the Year awards, multiple Colliers top deal awards  
Direct experience leading development, equity investing, syndicate partnerships, real estate modeling, and waterfall distributions

### COMMUNITY INVOLVEMENT

Urban Design Forum Fellow  
Urban Land Institute Member  
United Way of New York City – Young Leaders, Gridiron Gala Chair  
Ann Arbor Community Foundation – Next Generation Philanthropists Board Member  
Kerrytown Brownstones Association Board Member

# DAVID RAINES CHILLURA

1930 Broadway Apt. 5C, New York, NY 10023 · (973) 879 3183 · david.chillura@gmail.com

## EDUCATION

- Columbia University, Graduate School of Architecture, Planning & Preservation** – New York, NY **2020 – 2021**  
*Master of Science in Real Estate Development*
- University of Southern California, Marshall School of Business** – Los Angeles, CA **May 2018**  
*Master of Business Administration*
- Dean's List (Spring 2018)
- Georgetown University, McDonough School of Business** – Washington, DC **May 2011**  
*Bachelor of Science, Management*
- Member of the Georgetown University Football Team (Patriot League Dean's List – 2007)

## EXPERIENCE

- Maxim Capital Group** – New York, NY **2020 – Present**  
*Student Associate*
- Underwrote and modeled \$100MM+ worth of real estate transactions in multifamily and mixed-use asset classes across the Northeast and Southern United States.
  - Provided investment and valuation analysis and conducted due diligence on middle market, bridge financing ranging from \$2MM - \$60MM deals.
- 48 Capital** – New York, NY **May 2020 – October 2020**  
*Associate*
- Analyzed \$75MM+ worth of real estate transactions in industrial, multifamily and mixed-use asset classes across the Northeast, South and West Coast.
  - Sourced \$10MM+ of debt capital for first position permanent and bridge financing needs.
  - Assisted in the creation of acquisition pipeline and developed pro forma models for deals valued at \$20MM+ for mixed-use and multifamily transactions in New York City.
- Cognizant Consulting** – New York, NY **2018 – 2020**  
*Digital Strategy Senior Consultant*
- Led organizational readiness activities and managed adoption team in the implementation of a Salesforce product and an enterprise-wide workflow tool as part of a \$2B+ project.
  - Led integration effort in project management role to synchronize organizational readiness activities across 15+ application rollouts impacting 5,000+ employees.
  - Received GloboForce Platinum Award for high-performing consultant.
- APEC Business Advisory Council** – Los Angeles, CA **2017 – 2018**  
*Consultant / Researcher*
- Co-authored a report and developed strategic recommendations for government and business leaders that help foster inclusive growth and minimize the negative effects of globalization, trade and technological advancements within the Asia-Pacific region.
  - Conducted 45+ in-person interviews with business leaders and government officials in Australia and New Zealand identifying key insights into the benefits of world trade.
- Central Baptist Church** – New York, NY **2014 – 2016**  
*Associate*
- Strengthened relationships with church members to increase fundraising; generated \$20,000 for programming activities.
  - Engaged in community outreach to expand awareness of the church's mission and reputation by organizing events sponsored by local businesses and service providers; resulted in increased membership of 5%.
- Beacon Trust (Provident Bank)** – Morristown, NJ **2012 – 2014**  
*Associate*
- Managed more than 350 accounts valued at over \$1B as a client-facing team member; established and cultivated relationships with over 20 new clients.
  - Led project and team of five to update compliance information of over 900 clients following a company acquisition.

## SKILLS AND INTERESTS

- *Skills:* NYU Real Estate Investment Certificate, NYS Licensed Broker/Salesperson, CFA Level II Candidate, Training the Street Financial Modeling Certificate, Excel Financial Modeling, Microsoft Office
- *Interests:* Trojan Football, Golf, Reading, Behavioral Economics and Travel

## EDUCATION

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**Columbia University**, New York, NY  
*Master of Science, Real Estate Development*  
*President, Sustainable Development Club*

Expected Graduation August 2021

**Georgetown University**, McDonough School of Business, Washington, DC  
*Bachelor of Science, Finance. Concentration in Environmental Studies*  
**Study Abroad Program**, Cass Business School, London, UK

May 2014

September 2012 – May 2013

## EXPERIENCE

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**Spectrum Retirement Communities**, Denver, CO  
*Senior Development & Financial Analyst*

June 2019 – June 2020

- Member of internal team tasked with re-capitalizing estimated \$2.5 billion portfolio of senior housing assets. Work directly with external investment banking partner to prepare analysis and sale package targeting REITs and private equity firms. Redesigned the company's budgeting and development model as part of this process.
- Prepared real estate development, acquisition and operating models that include proposed capital structures and return analysis for senior living developer and operator.
- Evaluated and negotiated construction debt and re-financing options.
- Assessed potential sites and conduct pre-development underwriting.

**Dwight Funding**, New York, NY  
*Associate*

October 2017 – June 2019

- Associate for startup asset-based lending firm that provides working capital solutions to early and growth stage business with a focus on industries that include e-commerce, consumer goods, food and beverage and ad-tech.
- Lead underwriter for incoming deals and proposed amendments to current portfolio loans.
- Company's second employee tasked with building out the foundational policies and procedures including guidelines for risk tolerance and monitoring the financial performance of portfolio clients to identify and mitigate deteriorating credit.
- Maintain relationships with portfolio clients to act as a "value add" resource either through financial / operational guidance or connections to network partners such as venture capital and private equity firms, outsourced accounting / CFO groups, investment banks, attorneys and consultants.

**JPMorgan Chase**, New York, NY  
*Mortgage Advisory Analyst*

April 2015 – October 2017

- Worked directly with clients to develop mortgage and home equity solutions that meet their financing needs based on an analysis of their personal balance sheet, current cash flow and risk profile.
- Nominated by team lead to serve on the Mortgage Advisory Council, a team of 6 representatives across the JP Morgan North America mortgage practice. Developed and evaluated proposals to improve process and product offerings for Private Bank client base.
- Responsible for managing loan origination process including working with underwriters to effectively communicate our client's financial picture and align this with JP Morgan's current risk and regulatory guidelines.

## VOLUNTEERING & ADDITIONAL EXPERIENCE

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**Astia**  
*Volunteer Advisor*

2018 – 2020

- Evaluated, screened and advised early stage women-led ventures on business plans, funding options and launch strategies.
- Connected with entrepreneurs to provide business support including network resources and product feedback.

**Trillion Fund**, Internship, London, UK

2013

- Conducted due diligence and industry research to evaluate the viability of UK renewable infrastructure projects Trillion Fund was considering adding to its crowdfunding platform offering.
- Pitched potential investment opportunities to senior management including proposals for how the opportunity would be marketed.

**EDUCATION****COLUMBIA BUSINESS SCHOOL**

New York, NY

**MBA**, Real Estate Finance & Entrepreneurship

2020-2022

*Leadership:* Real Estate Association (AVP of Finance), Columbia Entrepreneurs Organization (AVP of Social & Marketing), Government and Business (AVP of Finance), West Coast Society (AVP of Events)

**ARIZONA STATE UNIVERSITY**

Tempe, AZ

**BS**, Accounting, December 2016

2013-2016

*Minor:* Economics*Honors:* Magna Cum Laude | Dean's List

*Leadership:* Millennial Money Club (Co-Founder), Beta Alpha Psi – The Accounting Fraternity (Chairman of Internal Audit), Real Estate Club (Member)

**EXPERIENCE****GOLDMAN SACHS ASSET MANAGEMENT**

New York, NY

**Fundamental Equity Product Management & Research Analyst** (2017-2020)

2016-2020

- Acted as lead client contact for US Growth business (~\$15bn under management) and conducted portfolio reviews and pitches with clients across the institutional, third party, and high net worth channels – raising over \$5bn
- Led a fundraising trip for technology-focused Strategy to Seattle with Japanese distributors which included 6 company management meetings, 8 company tours, and a thorough portfolio presentation which resulted in ~\$3.7bn of inflows
- Assisted research analysts in constructing financial models and company analyses primarily in the Payments and Semiconductor industries which helped inform Portfolio Managers' investment decisions
- Organized and led a buy-side equity research trip to the West Coast to conduct fundamental research on numerous holdings such as Google, Facebook, Snap, and Advanced Micro Devices and prepared investment takeaways that were presented on CNBC

**Fundamental Equity Product Management Summer Analyst** (2016)

- Performed portfolio analysis and assisted in the production of promotional materials for the REIT strategies (~\$8bn AUM)

**UDR, INC.**

Highlands Ranch, CO

*Multifamily Real Estate Investment Trust*

2015

**Financial Planning & Analysis Summer Intern** (2015)

- Prepared earnings release supplements and investor property tour materials
- Analyzed NAV and FFO models produced by external research parties to help Investor Relations and other senior members of the company prepare for interactions with buy- and sell-side analysts
- Performed due diligence, specifically apartment unit inspections and lease audits, relating to the 2015 acquisition of six Washington, DC communities for a total purchase price of \$901mn from Home Properties, L.P.

**WATERMARK CONTRACTING**

Phoenix, AZ

**Project Manager, Construction Worker** (2013-2016)

2013-2016

- Assisted in the bidding and production of ~\$5mn in multifamily asset improvement projects
- Acted as the project manager on ~25 projects, coordinating day-to-day operations while maintaining a clear channel of communication with both the president of the company and various sub-contractors

**JDH CAPITAL MANAGEMENT, LLC**

Phoenix, AZ

*Private Real Estate Investment Firm*

2020-Present

**Co-Founder and Principal** (2020)

- Completed the acquisition, remodel, and disposition of a townhome with plans to 1031 exchange proceeds into future projects
- Key responsibilities include sourcing opportunities, lead underwriting, budgeting and managing redevelopment, and communicating investment goals and results to both debt and equity partners

**ADDITIONAL INFORMATION**

*Certifications:* Commercial Real Estate Certificate, Cornell University; ARGUS Enterprise Training Fall 2020; Real Estate Valuation Course, A.CRE Accelerator; Real Estate Financial Modeling, Wall Street Prep; Series 7 & Series 63, FINRA

*Volunteer Work:* Northside Center for Child Development, Assistant Baseball Coach at Mesquite Jr High School

*Interests:* Stand-up Comedy (from Dave Chappelle in Radio City to Open Mics), Arizona State Football, Political Science

## EDUCATION

### **COLUMBIA BUSINESS SCHOOL**

**MBA**, Real Estate and Finance, May 2021

New York, NY  
2020-2021

*Leadership*: Vice President of Real Estate Association, Cluster X Community Co-Chair

*Member*: Real Estate Association, Green Business Club, Columbia Women in Business, Healthy Living Club

### **UNIVERSITY OF PENNSYLVANIA**

**BA**, Political Science and Hispanic Studies, May 2011

Philadelphia, PA  
2007-2011

*Study Abroad and Leadership*: writing tutor, teaching assistant, one-semester study abroad in Spain, admissions tour guide

## EXPERIENCE

### **LOCAL INITIATIVES SUPPORT CORPORATION (LISC)**

Remote  
2020

*National Community Development Financial Institution (CDFI) with \$22B invested over 40 years.*

**Summer/Fall Associate, LISC Strategic Investments** (*received full-time offer*)

- Source, underwrite, and conduct due diligence for impact investment opportunities; write investment committee memos
- Develop, refine, and standardize internal impact investment framework and fund diligence process
- Conduct investor outreach efforts for Black Economic Empowerment Fund (target size \$250M); develop marketing materials to solicit Fortune 500 donors; support team in fund formation
- Support team in formation of \$75M Detroit affordable housing fund comprised of low-cost debt and grant money

### **BRYANT PARK CORPORATION (BP) / 34<sup>TH</sup> STREET PARTNERSHIP (34SP)**

New York, NY  
2013-2020

*Nonprofits privately funded by real estate developers to provide sanitation, beautification, safety, and advocacy services to surrounding neighborhood. Pioneers in successful public-private partnerships.*

**Deputy Director of Operations** (2018-2020)

- Coordinated operations and public programming in the world's most densely populated park (Bryant Park) and NYC's second-busiest pedestrian plaza (Herald Square Plaza, located within 34SP)
- Advised REIT on public space management and city agency navigation as it undertook \$2B redevelopment of portfolio
- Operated and amenitized Privately Owned Public Spaces (POPS) for real estate owners following property manager requests and tenant input, improving curb appeal and increasing rent roll
- Directed construction projects such as: pedestrianization of two street blocks; a multi-block overhaul of streets and plazas within 34SP in coordination with NYC DOT; and the annual build of Bryant Park Holiday Shops
- Managed community notification and feedback collection on behalf of real estate developers and city agencies for development/construction projects

**Operations Manager** (2017-2018)

- Negotiated with NYC Department of Transportation to renew 34SP's license agreement to operate public spaces
- Managed four pop-up market projects with combined annual revenue to the nonprofits of \$2.5M: negotiated agreements with producer, selected vendors, negotiated rent, and managed onsite operations

**Operations Associate / Analyst** (2014-2017)

**Office Manager / Receptionist / Research Assistant** (2013-2014)

- Designed and executed public outreach project as part of a pilot program for a new pedestrian plaza (Plaza33) within 34SP; gathered data points from over 3,000 stakeholders; presented analysis of results to local Community Board
- Implemented over 20 free weekly events in both BPC and 34SP; oversaw 7 award-winning free game and activity areas

### **DECHERT LLP**

New York, NY  
2011-2013

**Legal Secretary**

- Supported 8 lawyers at firm, including billing and scheduling, while weighing whether to apply to law school

## ADDITIONAL INFORMATION

*Software*: ARGUS, TREPP, Python

*Member*: Urban Land Institute – New York, International Downtown Association

*Volunteer Work*: Leukemia & Lymphoma Society, New York Road Runners, Penn Alumni Admissions Interviewer

*Interests*: distance running (one marathon; half marathon personal best of 1:46), cooking, baking, crossword puzzles



## EDUCATION

### **COLUMBIA BUSINESS SCHOOL**

**MBA**, Real Estate and Finance, May 2021

New York, NY  
2019-2021

*Honors:* Pension Real Estate Association Scholarship, 1 of 10 awarded annually

*Leadership:* Chief of Staff, CBS Student Govt. Exec Board 2021; Hermes Society; Peer Advisor;

Teaching Assistant: Real Estate Securities Analysis with Professor Ross Smotrich

*Clubs:* Real Estate Association, Private Equity Club, Technology Business Club

### **INSTITUTE OF CHARTERED ACCOUNTANTS**

**Chartered Accountant (in the top 1%);** Accounting, Financing, and Commercial law, January 2013

Mumbai, India  
2009-2013

### **NARSEE MONJEE COLLEGE OF COMMERCE & EDUCATION**

**BCOM (Bachelor of Commerce)**, Accounts & Economics, March 2011

Mumbai, India  
2008-2011

## EXPERIENCE

### **BEACON CAPITAL PARTNERS**

*Boston based Real Estate investment firm with over \$18Bn in total equity invested*

Boston, MA  
2020-Present

#### **MBA Associate – Acquisitions & Portfolio Management**

- Conceptualized investment thesis to enter the real estate for life sciences industry by speaking to experts in the leasing, VC, and bio-technology sectors; recommended to the C-Suite 3 of the 12 cities that maximized risk adjusted returns
- Forecasted costs to repurpose existing office properties to the needs of life science companies, and estimated an opportunity size of \$25B by conducting secondary research to ascertain returns under different investment strategies
- Performed tenant credit analyses in a value-add deal to assess potential risks of VC backed early stage biotech companies; identified risk mitigating solutions and underwrote returns under various scenarios to protect downside

### **STATUS CONSTRUCTION PRIVATE LIMITED**

*Real estate development company with projects across India measuring 1,750,000 sq.ft.*

Mumbai, India  
2015-2019

#### **Director – Expansion, Operations, and Sales**

- Evaluated 6 projects across 3 sectors based on capital investment and cash flow returns to diversify operations; identified redevelopment as the best opportunity and undertook 2 new projects, increasing AUM from \$8M to \$34M in 33 months
- Implemented a project management system to synchronize coordination in a cross functional team of 10 to prepare blueprints and execute the construction plan; helped meet pre-decided timelines versus an industry-wide average delay of 6 months
- Convinced a risk-averse board the rationale behind monetizing assets and reinvesting the funds in the higher yielding redevelopment project; identified and pitched to marquee buyers raising \$4M (20% of total project cost)
- Created a ‘just-in-time’ inventory management system and negotiated delivery terms with suppliers to optimize working capital, prevent supply bottlenecks, and reduce on-site wastage, helping save 3% of soft costs
- Collaborated with 3 other real estate developers to negotiate bulk discounts with cement and steel suppliers, thereby reducing hard costs by 6%
- Spearheaded a data analytics project to identify target segments and increase sales conversion through targeted marketing channels such as Virtual Reality, doubling sales in 12 months to \$6M

### **JP MORGAN SERVICES INDIA PRIVATE LIMITED**

**Investment Banking Analyst Energy group**

Mumbai, India and New York, NY  
2013-2015

- Defended an integrated midstream company with a firm value of \$40B against shareholder activism and hostile stake buy outs by convincing ways to unlock value by changing the corporate structure, presenting drop-down and SOTP valuations
- Identified key institutional investors for IPO participation, built an order book, and prepared presentations for investor road shows for the largest ever Master Limited Partnership (MLP) IPO at the time, valued at \$500M
- Completed a \$400M sell side deal for an upstream oil & gas company; prepared management presentations, managed the data room and handled due diligence queries from bidders
- Coordinated with VPs and MDs to identify the skills required, prepared a training module, and conducted training on the Net Asset Valuation (NAV) technique for 30 investment banking analysts in New York, Houston, Calgary, and Mumbai

## ADDITIONAL INFORMATION

*Work Authorization Status:* Eligible for STEM OPT (3 years)

*Technical Skills:* Argus, MLP modelling (LP/GP structure), Net asset valuation

*Volunteer Work:* Initiated an education CSR program at Status where employees and their families teach and/or fund laborer’s children; currently have 15 volunteers enrolled who have taught over 50 children

*Interests:* Soccer (Manchester United fan), Tennis, Classic rock music (played guitar), Solo backpacking travel, and Politics

## EDUCATION

**COLUMBIA BUSINESS SCHOOL**, New York, NY 2019 – 2021

**MBA**, Executive Program. (*May 2021*)

*Honors*: Dean's Honor List Summer 2020 Semester

*Member*: Real Estate Association

*Relevant Coursework*: Real Estate Finance, Real Estate Transactions, Real Estate Equity Securities Analysis,

Real Estate Debt Markets, Residential Real Estate: Dirt, Debt, & Derivatives.

**VILLANOVA UNIVERSITY**, Villanova, PA 2005-2008

**BA**, Communications. Double minor in Economics and Business

*Member*: Villanova Fixed Income Society, Villanova Equity Society

## EXPERIENCE

**TACONIC INVESTMENT PARTNERS**, New York, NY 2016 – 2020

*New York City Real Estate Developer specializing in commercial office, mixed-use, and residential developments.*

**Senior Associate, Construction & Development**

- Established project budgets by sourcing and estimating construction costs during initial design development phase.
- Coordinated and managed construction schedule in conjunction with Site 1 condominium closings, ensuring all closings occurred on schedule, resulting in \$70,000,000 of sales.
- Evaluated, negotiated and awarded contracts to consultants including architects, engineers, city agency expeditors and third-party special inspectors to build out the project's design team.
- Analyzed loan documents to ensure project remained in compliance with all construction related covenants.
- Provided Acquisitions team with accurate hard and soft cost projections to be used within the underwriting of prospective deals.
- Performed physical due diligence on potential acquisitions; examining base building MEP systems, equipment, infrastructure, condition, quality, and as-built drawings to determine accuracy of information provided by seller.
- Select development projects:
  - Essex Crossing Site 1 – \$160 million, 180,000 SF mixed-use, 55 condo unit ground up new development.
  - Essex Crossing Site 3 – \$360 million, 346,000 SF mixed-use, 81 high end condo unit ground up new development.
  - 730 3<sup>rd</sup> Avenue – \$110 million, 665,000 SF, commercial office redevelopment of TIAA's NYC headquarters.

**SHAWMUT DESIGN & CONSTRUCTION**, New York, NY 2013 – 2016

**Construction Management Skills Training (CMST) Program – rotations included:**

**Assistant Superintendent (2015 -2016)**

- Supervised daily field operations on the \$25 million NBA flagship store, gaining insight on a commercial redevelopment project.
- Coordinated construction schedule among subcontractors, leveraging negotiation and management skills to hit project milestone dates.

**Assistant Project Accountant (2014-2015)**

- Entered and maintained financial tables, budgets, project costs and monthly owner invoicing to drive revenue.
- Prepared Monthly GMP billing for \$35 million Ralph Lauren flagship on Fifth Avenue.

**Assistant Project Manager (2013-2014)**

- Prepared monthly project cost to complete budget analysis to identify and address potential cost overruns.

**GOLF DIGEST – Digital Coordinator**, New York, NY 2012 – 2013

- Supervised advertising campaigns and supported sales team with sales efforts and digital partnerships.

**SUMRIDGE PARTNERS, LLC, Fixed Income Sales Analyst**, Jersey City, NJ 2010-2011

- Maintained client relationships with retail advisor and institutional buyers and sellers of corporate and municipal debt.

**DIGITAL CAPITAL ADVISORS**, New York, NY 2010- 2010

**Intern, Digital Media Investment Bank**

**DELBARTON SCHOOL**, Morristown, NJ 2008- 2010

**Assistant Director for Alumni and Development**

## ADDITIONAL INFORMATION

- REFM Certification in Excel for Real Estate Levels 1, 2, 3 – with Distinction

# JAKE M. GREENBERG

New York, NY

(215) 801-5924 | j.greenberg@columbia.edu

## EDUCATION

### Columbia University in the City of New York

New York, NY

*Master of Science in Real Estate Development*

August 2021

**Relevant Coursework:** *Business of Development, Real Estate Finance, Architecture of Development, Legal Principles of Real Estate, Real Estate Financial Excel Modeling, Real Estate Investment Fundamentals*

### University of Florida Warrington College of Business

Gainesville, FL

*Bachelor of Science in Finance; Minor in Real Estate (Dean's List 2016 – 2020)*

May 2020

**Relevant Coursework:** *Financial Accounting, Macroeconomics, Business Calculus, Business Finance, Real Estate Analysis, Equity and Capital Markets, Debt and Money Markets*

### Studied at IES Abroad

Barcelona, Spain

*Liberal Arts & Business*

Spring 2019

## EXPERIENCE

### Epic Commercial Realty

New York, NY

*Investment Sales Associate*

Summer 2019

- Participated in a brokerage training program that provided necessary skills to discern clients' acquisition criteria, negotiate off-market listings, and advise clients on their real estate investment strategies.
- Entertained and led 2 open houses for clients interested in purchasing a 52-unit package deal in the Bronx for \$33,000,000 as well as a free market, multifamily building in Brooklyn for \$1,200,000.
- Worked closely with a senior analyst to create valuations of properties based on comparable models and quarterly market reports of transactions conducted throughout the 5 boroughs.

### EMM Wealth

New York, NY

*Private Wealth Management Analyst*

Summer 2018

- Worked directly with the Wealth Advisory team in developing various operational and investment strategies by creating projection models through 2050 for over 20 client portfolios.
- Participated in wealth manager meetings to discuss recent economic market trends, asset allocations, and alternative investment strategies that have implications on 120 client portfolios.
- Analyzed and created presentations using Excel and Bloomberg Terminal to display proper client asset allocations based on the investor's risk level, tolerance, and investment time frame.

## LEADERSHIP AND PERSONAL DEVELOPMENT

### Mentor GNV

Gainesville, FL

*Mentor*

Aug. 2017 – May 2020

- Worked with an elementary school student to assist his academic and social challenges.
- Increased the student's insight on subjects ranging from literature to basic mathematics.
- Successfully implemented a structured schedule to enable for better time management skills outside the classroom.

### Florida Blue Key Speech & Debate

Gainesville, FL

*Finance Staffer*

Sept. 2017 – May 2020

- Created an accurate budget and balance sheet of the finances incurred during the tournament.
- Collected and managed over \$100,000 in registration fees amongst schools across the nation.

## ADDITIONAL INFORMATION

- **Interests:** Surfing, golfing, Philadelphia Eagles, *Behind the Bricks* podcast, traveling
- **Affiliations:** Urban Land Institute (ULI), RE Private Equity Club, Hospitality Development Club, Pi Lambda Phi Fraternity
- **Other:** Udemy Advanced Real Estate Development Modeling Certification, Real Estate Salesperson License (pending 2021)
- **Skills:** Excel Financial Modeling, Microsoft Office, CompStak, APTO

## EDUCATION

### COLUMBIA BUSINESS SCHOOL

**MBA**, Real Estate, May 2022

New York, NY

2020-Present

*Leadership:* AVP of Alumni & Mentorship – Real Estate Association; AVP of Finance – Hospitality and Travel Association; AVP of Events – Family Business Club

*Member:* Arts Society; Columbia Women in Business; Golf Club; Gourmet Club; Hermes Society; Wine Society

### UNIVERSITY OF SOUTHERN CALIFORNIA

Los Angeles, CA

**BS**, Business Administration; **Minor**, Real Estate Development, December 2014

2011-2014

*Honors:* Magna cum laude (3.7 GPA); Marshall School of Business Dean's List; Merit-based scholarships: Darren Dahlman Memorial Endowed Scholar and Jeffrey N. Ansbacher Memorial Endowed Scholar

*Leadership:* Senior Advisor, Vice President of Student Affairs, Treasurer, Director of Funding – Marshall Business Student Government; Investment Banking Mentor – Trojan Investing Society; Historian, Marketing Chair, Philanthropy Committee – Alpha Kappa Psi Professional Business Fraternity; Mini-Course Teacher – Joint Education Project

*Internships:* Finance and Accounting Undergraduate Associate (2013) – Disney ABC Television Group; Financial Analyst Intern (2013), Business Development Intern (2012) – Singpoli Capital Corporation; Wealth Management Intern (2012) – Merrill Lynch

## EXPERIENCE

### DIVCOWEST

San Francisco, CA

*Vertically-integrated owner operator (\$8.1bn AUM) focused on office and lab assets in bi-coastal markets*

2018-2020

**Capital Strategies & Formation: Associate Director** (2020), **Associate** (2018-2019)

- Spearheaded creation, production, and maintenance of marketing materials such as pitchbooks, due diligence questionnaires, and investment memorandums for fundraises worth ~\$2bn for a value-add fund and \$750mm for 3 core / core-plus separate accounts
- Coordinated with the Acquisitions, Asset Management, Accounting, Legal, and Property Management departments to manage 3 separate account portfolios with assets in major U.S. metropolitan cities
- Collaborated with internal teams to process and incorporate accurate data to ensure timely responses for an upwards of ~70 clients, including limited partners, consultants, and investor prospects
- Presented weekly updates on existing investor base and prospective relationships to the senior management team
- Led yearly summer internship program by creating educational sessions, organizing luncheons and external speaker events, and mentoring 4-6 summer analysts on best practices

### J.P. MORGAN

San Francisco, CA

*Technology Equity Capital Markets group – raised capital through IPO and follow-on offerings*

2014-2017

**TMT ECM Investment Banking: Analyst** (2015-2017), **Summer Analyst** (2014)

- Executed IPO and follow-on offerings for 100+ clients in the software, internet, and semi-conductor sectors by envisioning and creating bake-off pitches as well as execution strategies as the lead Analyst without Associate to Vice President-level involvement
- Select transaction experience (16 completed deals):
  - Twilio's \$173mm IPO and \$322mm follow-on offering
    - Completed detailed analyses for topics such as dual-class structure, exchange considerations, and shareholder evolution trends; tracked valuation changes; updated IPO valuation matrix
  - Snap's \$3.9bn IPO
    - Conducted thorough investor targeting; evaluated pricing and performance of precedent \$1bn+ IPOs; assessed no-vote / low-vote structure and staggered lock-ups for the company's IPO
- Appointed to work with the North America Head of Equity Capital Markets and Head of Technology Investment Banking to analyze market trends and prepare impactful materials for the annual J.P. Morgan Technology Innovation Symposium
- Ranked at top of Investment Banking Analyst class and received Class of 2018 Investment Banking Associate promotion
- Interviewed 70+ candidates and planned information session for ~200 attendees as the J.P. Morgan – USC Recruitment Head

## ADDITIONAL INFORMATION

*Certifications and Skills:* Series 79; Series 63; Argus Enterprise Training Certification Program (in progress)

*Volunteer Work:* USC Alumni Board of San Francisco (planned fundraisers, community service events, and socials for USC Alumni); Exploratorium Museum (volunteered at interactive science, technology, and arts museum based in San Francisco and hosted events for ~200 members); piano (raised \$3k to fund 4 Chinese orphans' cleft lip operations by selling CDs)

*Interests:* Art; charcuterie boards; event planning; gardening; oil painting; TaeKwonDo (black belt); traveling; yoga

**EDUCATION****COLUMBIA BUSINESS SCHOOL****MBA**, Finance, May 2021

GMAT:770

New York, NY

2019-2021

*Honors:* Columbia Fellow (merit-based scholarship), Deans List (Fall 19', Spring 20')*Leadership:* Teaching Assistant- Corporate Finance (Fall 20'), Accounting (Spring 21')*Member:* Energy and Infrastructure Club, Real Estate Association, CBS Football Club, Snow Sports Club**STANFORD UNIVERSITY****BS**, Civil and Environmental Engineering, June 2016

Stanford, CA

2012-2016

**EXPERIENCE****AMERICAN CONTINENTAL PROPERTIES, LLC.****Summer Associate**

New York, NY

2020-2020

- Performed market research and prepared a quarterly update for the company's retail portfolio.
- Wrote a comprehensive RFP for owners representative services for a retail tenant improvement fit out.
- Built a database with all Manhattan commercial sales \$20+ million over the last 4 years. Researched each deal, recorded notes, and validated \$/SF or \$/Buildable Square Foot for development site sales.
- Wrote a 30+ page report analyzing zoning, development, and annexation regulations in Cody, WY. Made recommendations regarding possible development opportunities for the company's 21,000+ acres owned in the county.

**DEVCON CONSTRUCTION, INC.****Project Engineer (2018-2019)**

Milpitas, CA

2016-2019

- Budgeted a \$4 billion dollar mixed used development containing (11) buildings, a below grade parking garage, central plant, and million square foot green roof.
- Led a team of four engineers to assemble the second iteration of the cost estimate for the above project. Drafted the initial schedule, provided value engineering ideas to reduce costs, and presented the budget directly to the client.
- Project manager for a \$20 million dollar school building from schematic design to permitting phase. Wrote the owner contract, prepared the contract budget and schedule, bought out long lead items such as steel, glass, elevators, and MEPs.
- Guided the architects and consultants to reduce costs on the above project. Saved the client \$150,000+ by finding an exemption in the code for fire rated glass requirements in school corridors.

**Field Engineer (2016-2018)**

- Assisted in budgeting \$300 million worth of scope for Stanford University's expansion into Redwood City. Project consists of a 30-acre campus containing (4) office buildings, a gym, a parking garage, a data center, and a central utility plant.
- Wrote over 50 subcontracts and consulted on numerous others to buy out the scope in the budget. Uncovered \$2 million dollars of cushion in our metal panel budget due to incorrect subcontractor material take-offs.
- Prepared weekly schedule and budget forecasts for (2) of the office buildings.
- Coordinated multiple subcontractors to ensure scope was executed in compliance with the design documents
- Proposed and managed design changes to the window washing scope resulting in over \$500,000 worth of savings.

**GNL QUEBEC, INC****Consultant for Freestone International LLC**

San Francisco, CA

2018-2019

- Assisted in developing a unique \$7 billion LNG facility in Quebec, Canada that will be the lowest GHG emission LNG export facility in the world due to being powered by renewable hydro-electricity.
- Analyzed North American natural gas reports and used collected data to update gas supply strategy for the project
- As an intern in 2014, spearheaded drafting the natural gas export license to secure authorization from the government.

**BECHTEL CORPORATION****Procurement Intern**

Cameron, LA

2015-2015

- Inventoried and issued materials to support the procurement of the first large scale LNG export facility in the U.S.
- Requested bids and awarded purchase orders to various suppliers for materials. Expedited critical items for plant start up.

**ADDITIONAL INFORMATION**

Born in Bangkok, and spent two summers in high school doing volunteer work in South East Asia

Have worked as a website developer, ranch hand, carpenter, home builder, and dishwasher.

**EDUCATION****COLUMBIA BUSINESS SCHOOL****MBA**, Real Estate & Finance, May 2022

New York, NY

2020-2022

*Honors:* NAREIM Jeff Barclay Fellow, UT Austin National Real Estate Challenge Team*Leadership:* Real Estate Association – AVP Communication, Wine Society – AVP Events*Membership:* Private Equity Club, Columbia Women in Business, Hermes Society**CORNELL UNIVERSITY****BA**, Major in Government & French, Minor in Real Estate, May 2016

Ithaca, NY

2012-2016

*Honors:* ULI & Wells Fargo Merit Scholarship Recipient*Internship:* Acquisitions Summer Analyst at Harrison Street Real Estate Capital*Membership:* Mutual Investment Club – Real Estate Director, Cornell Real Estate Club, Delta Delta Delta – VP Finance, Varsity

Women's Rowing Team – Coxswain

**EXPERIENCE****META HOUSING CORPORATION**

Los Angeles, CA

*Developer and owner/operator of affordable housing with \$1B in assets and \$1B pipeline*

2016-2020

**Development Project Manager***Financial Modeling & Analysis*

- Underwrote over \$200MM in multifamily, affordable, tax credit financed development opportunities and managed proforma financial analyses for existing deals, including development budgets, cash flow projections, and tax credit modeling
- Solved \$3.5MM financing gap through workouts and negotiations with lenders and agencies, converting project experiencing \$4.5MM in cost overruns to \$1.4MM in profit
- Managed full profit and loss responsibility for development projects including developer fee, tax credit equity modeling, and debt sizing and repayment analyses, generating over \$15MM in developer fee income and delivering over 500 units
- Sourced and researched project financing, managing internal team to prepare public financing applications, raising over \$80MM in public funds across six deals
- Negotiated 100% waiver of tax credit timing adjuster (late project delivery penalty fee) with equity investor, saving \$600K

*Deal Management*

- Oversaw development pipeline of \$140MM in ground-up, multifamily, affordable housing deals from cradle to grave
- Managed project team inclusive of investors, lenders, attorneys, design and construction team, regulatory stakeholders, and junior reports
- Selected by Meta's President to spearhead critical \$26MM new development opportunity in Pismo Beach, CA, including land acquisition, securing entitlements and financing, managing City relations, presenting to City Council, and determining proforma economic feasibility
- Oversaw complex environmental remediation process for 46-unit deal in Carson, CA, navigating changing public environmental regulations to save 20% in remediation costs
- Closed construction and permanent financing for existing deals
- Engaged in stabilization and leasing of assets, overseeing property management team
- Youngest to be promoted to PM in company history, a role which involved full ownership of underwriting, investor and lender relations, running financing closings, managing all consultants and the pre-con/construction process, and four internal direct reports

**ADDITIONAL INFORMATION***Certifications & Skills:* Excel (REFM, A.CRE Accelerator), Argus (2020 Training & Certification)*Membership:* Urban Land Institute – Young Leaders Group, Partnership Forum, & Women's Leadership Initiative*Volunteer Work:* Cornell Club of Los Angeles – Board Member & Networking Chair, Cornell Alumni Admissions Ambassadors*Interests:* Mentoring (Saturday Business Academy), running (Chicago half marathon, NYRR), wine (WSET Level 1-2, Level 3 in progress)

## EDUCATION

### **COLUMBIA BUSINESS SCHOOL**

New York, NY

**MBA**, Real Estate, May 2021

2019-2021

*Leadership*: Real Estate Association AVP of Events

*Member*: Real Estate Association, Columbia Women in Business, Snow Sports Club

### **HARVARD UNIVERSITY**

Cambridge, MA

**AB**, Statistics, May 2016

2012-2016

*Secondary*: Computer Science

*Honors*: All-Academic Ski Team Award (2014-2016)

*Leadership*: Captain of NCAA Alpine Ski Racing Team (2014 season)

## EXPERIENCE

### **SAVANNA REAL ESTATE** (*Real Estate Private Equity Firm*)

New York, NY

#### **Summer MBA Intern**

Summer 2020 - present

- Assisted with \$435m completed acquisition of 1375 Broadway, a 500,000 sqft office building in Times Square South
- Act as liaison between Savanna and its property managers for COVID tenant communication and occupancy tracking
- Researched NYC condo market and opportunities for an independent study project
- Support asset management team on leasing, collections, capital improvements and refinancing

### **METAPROP** (*PropTech VC Firm*)

New York, NY

#### **In-Semester MBA Intern**

Spring 2020

- Evaluated prospective investment that went through investment committee review; completed business, market and financial due diligence and investment write-up for team
- Participated in numerous investment “pitch calls” with entrepreneurs seeking capital and internal debrief follow-up calls
- Created database of PropTech investments by competitor VC firms to identify potential future investment opportunities

### **TRAMMELL CROW COMPANY (TCC)**

Philadelphia, PA

#### **Pre-MBA Development Intern**

Spring 2019

- Evaluated new opportunities and managed existing projects for industrial and senior housing properties in the Northeast
- Conducted a “Highest and Best Use” analysis on one-acre development site in Queens, NY; presented recommendation to deal team which was accepted
- Collected market data and prepared investment committee memo for a 700,000 SF industrial property in NJ
- Participated in site visits, OAC meetings and tenant tours

### **CBRE** (*Corporate Development Group – M&A and Strategy*)

Philadelphia, PA

**Senior Financial Analyst** (2018-2019); **Financial Analyst** (2016-2018)

2016-2019

#### M&A

- Performed due diligence and executed on acquisitions of real estate services companies across the U.S., including brokerage, capital markets, and project management companies
- Closed six transactions including Skye Group, Capstone Financial, Caledon Capital Management, Custom Spaces, Peloton and Noveen
- Built financial models to assess returns impact of different valuations, deal structures, and financial growth assumptions

#### Strategy

- Collaborated with Chief Strategy Officer on strategic initiatives through surveying executives and business leaders; created surveys, collected the data and reported on findings
- Worked closely with CFO to prepare documents for CBRE earnings calls and analyze data of competitors
- Analyzed company data for statistical insights using R (statistical software)

## ADDITIONAL INFORMATION

*Volunteer Work*: Sam’s Race for a Place – Founder and Volunteer. Raised \$68,000 for Ronald McDonald Houses in Springfield, MA, Philadelphia and Boston, and volunteered to do arts and crafts with children at Houses; Compass – deputy team leader of pro bono consulting group working with Jounce Partners, a Philadelphia nonprofit restructuring its board

*Interests*: Running (2017 half and full marathons in Philadelphia; 2018 Boston Marathon); skiing; golf; cooking; seeing live music; book clubs (founded club in Philadelphia)

# Begum Karaoglu

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## Education

### Columbia University Graduate School of Architecture, Planning and Preservation

Master of Science in Real Estate Development  
Master of Architecture

September 2018-  
December 2021  
New York, NY

### University of Pennsylvania, College of Arts and Sciences

Bachelor of Arts in Architecture, minor in Urban Real Estate Development from the Wharton School of Business, Undergraduate cumulative GPA: 3.56/4.0  
Honors: Dean's list 2016-2017, graduated with Cum Laude Latin Honors

August 2014-May 2018  
Philadelphia, PA

### Bilkent Laboratory International School

Completed the International Baccalaureate Program (IB) with a final extended essay titled; 'Sedad Hakki Eldem: Making Turkish Regionalism in Architecture Globally Relevant'

Graduated: June 2014  
Ankara, Turkey

## Relevant Experience

### Robert A.M. Stern Architects, LLP. Summer Intern

- As part of the Whalen-Marani joint studio, participated in their flagship virtual Design Charette, both as a member of a group of 4 interns tasked with masterplanning an artist community located in Tarrytown, NY as well as individually on a 30,000 sqft student dormitory project.

July 2020  
New York, NY

### IS Real Estate Investment Trust, Project Development and Feasibilities Division Summer Intern

- Conducted zoning analysis, researched capitalization rates, market comparables and geo-demographic information of properties in Besiktas, Istanbul and prepared a pro-forma balance sheet for the new condominium development project at its idea-inception phase.
- Produced marketing materials for 'Kartal Manzara Adalar', a mixed-use project and attended GISP (Strategy Platform for Real Estate in Turkey) conference as an active guest discussing low-income housing politics in Turkey.

May-June 2017  
Istanbul, Turkey

### Yuksel Proje, Architecture and Project Management Division Summer Intern

- Oversaw design and implementation of an extension of office space while working on CAD drawings and attending weekly meetings with consultants.

June-July 2015  
Ankara, Turkey

### Habitat for Humanity, Volunteer

- Participated in the construction of one duplex house and helped two partner Habitat families to build their own houses.

May 2014  
Radauti, Romania

## Memberships and Extracurricular Activities

Member of the Leadership Team for the Design Driven Development Club at Columbia GSAPP  
Member of the Multifamily Development Club at Columbia GSAPP  
Member of the Wharton Undergraduate Real Estate Club at the University of Pennsylvania  
Member of the Urban Land Institute (ULI)  
Member of Club Tennis at UPenn and licensed player of the Turkish Tennis Federation

## Skills

Software				Fabrication	Language
Photoshop	●●●●	Rhinoceros	●●●●	CNC milling	Turkish (native)
Illustrator	●●●●	Revit	●●○○	3D Printing	English (native)
InDesign	●●●●	V-Ray	●●●○	Laser cutting	Italian (elementary proficiency)
Premiere Pro	●●○○	Grasshopper	●●○○	Casting	
After Effects	●●○○	SketchUp	●●●○	Milling and lathes	
AutoCAD	●●●●	Excel	●●●○		



# LORA LI

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## EDUCATION

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### **Columbia University in the City of New York**

*Master of Science in Real Estate Development & Finance*

Relevant Courses: Real Estate PE, RE Financial Modelling, Asset Mgmt & Distressed Investment, Global REITs, PropTech, etc.

**New York, US**

06/2019 - 06/2020

### **Parsons School of Design, The New School**

*Bachelor of Business Administration in Strategic Design & Management*

Relevant Courses: Strategic Mgmt, Venture Capital, Data Visualization, Design & Tech, Marketing & PR, Luxury Management, etc.

**New York, US**

08/2015 - 05/2019

## EXPERIENCE

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### **Lennar International, subsidiary of Lennar Corporation (NYSE:LEN)**

*Asset Management & International Investor Relations*

**New York, US**

01/2020 - 07/2020

- Assisted with the preparation and review of a nationwide multifamily build-to-core venture, comprising \$1.0-1.5 billion for development of a \$2-3 billion high yielding portfolio of Class-A assets, responsible for creating client reports at a portfolio level, monitoring and analyzing the financial performance of the properties and portfolios by reviewing due diligence materials and performing IRR and DCF models
- Underwrote and pitched a 150-unit single-family home development deal to investment committee as the internship's capstone project, requiring an IC memo, property valuation analysis and detailed financial models
- Analyzed and composed a detailed list of over 600 U.S. development projects/finance deals backed by more than 120 Asia-based equity & debt sources to better understand the foreign investors' investment parameters; Developed and fostered relationships with the largest multinationals partners in Asia, such as Shanghai Municipal Investments and Gaw Capital, to align foreign capital interest with Lennar's varied investment platforms; Developed flash, quarterly reports and marketing books for international investors on an as-needed basis
- Developed in-depth knowledge and conducted daily analysis on the impact of COVID-19 in the Asian real estate market to help understand the trajectory of the company's current portfolio, reported directly to CEO; Actively participated in internal presentations/discussions, and provided insightful opinions to help develop international business strategies for new and existing investments

### **Guangzhou Posheng Investment, Founders of the China Private Sector Economy Development Forum**

*Development & Acquisition*

**Guangzhou, CN**

12/2017 - Present

- Assisted with an initial project review, underwriting, and proposal of 771MM SF land acquisition application to Hainan Provincial Government. Supported the franchising of the Hainan branch of the Shanghai Diamond Exchange (the only diamond import and export trading platform in Mainland China); Reached initial agreement on strategic initiatives with Richemont Group and LVMH Group
- Assisted in the underwriting of a 172MM SF mixed-use PPP development in Guangzhou Nansha Free-Trade Zone, consisting of Class-A offices, high-rise multi-family, retail center, and industrial warehouses; Conducted due diligence by gathering and analyzing critical risk data, absorption rates and sales comps; Negotiated the complex zoning and tax incentives with Guangdong Provincial Government and Municipal Planning Bureau
- Liaised with Zhejiang Provincial Government on land matters and obtained approval permits for phase II development on a 1MM construction area of Taizhou White Swan Hotel; Engaged in construction preparations such as procurement of materials from international markets

### **White Swan Hotel Group, first 5-star hotel in mainland China, subsidiary of Guangdong SOE**

*Real Estate Investment Analyst*

**Guangzhou, CN**

12/2016 - 09/2017

- Performed market analysis, produced financial models, and participated in the strategic site planning of a 266MM SF tourism mixed-use complex in the Greater Bay Area, a combination of high-end villa residences, commercial real estate, international schools, and hotel resorts

*Overseas BD - Los Angeles, CA*

03/2016 - 10/2016

- Participated in strategic cooperation with 20th Century Fox World theme park entering Chinese market; Prepared and negotiated project-level term sheets, IP import/export, JV structure, Sino-US legal affairs and taxation, offshore shareholding structures, LOI, etc.

*Marketing & Communication Intern*

06/2015 - 09/2015

- Formulated new marketing strategies, designing virtual campaigns, utilizing CRM databases, conducted market and competitor research, continued building and maintenance of a deep understanding of hotel history and legacy, managing quarterly communications plans and digital media; Achieved social media visits of more than 100,000 users with 75% increase within 2 months

## SKILLS

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- Microsoft - Word, PowerPoint, Excel; proficient
- Finance Excel modeling - Pro Forma, Waterfall; proficient
- Argus Enterprise; proficient
- Mandarin Chinese, Cantonese Chinese, English; fluent
- CFA I - 12/2020
- Adobe software - Photoshop, AI, InDesign; advanced
- Data visualization - Tableau; proficient
- Drawing & Painting - Acrylic, watercolor, etc.; proficient
- GIA Diamond Essentials Certificate

## EDUCATION

### COLUMBIA BUSINESS SCHOOL

New York, NY

MBA, Focus on Real Estate, May 2021

GMAT: 760 (99<sup>th</sup> percentile)

2019-2021

*Honors:* Columbia Fellow Merit Scholarship*Leadership:* VP Education, Real Estate Association; VP Connect, Hermes Society; Career Management Fellow; Peer Advisor; Teaching Assistant, Real Estate Finance (Prof. Stijn Van Nieuwerburgh)*Case Competitions:* UT Austin National Real Estate Challenge (November 2019)*Member:* Hospitality & Travel Association, Snow Sports Club, Wine Society, CBS Gourmet, Canucks Club

### UNIVERSITY OF TORONTO FACULTY OF LAW

Toronto, Canada

JD, June 2015

2012-2015

*Honors:* Laskin Prize (awarded to students placing the highest in Constitutional Law)*Leadership:* Co-President, Business Law Society; Senior Associate Editor, Faculty of Law Review*Member:* Associate Editor, Journal of International Law & International Relations; Mentor, Law School Prep Program

### SCHULICH SCHOOL OF BUSINESS, YORK UNIVERSITY

Toronto, Canada

iBBA, Finance Major, October 2012

2008-2012

*Honors:* Graduated with Distinction, Dean's Honor List (2008-2012), Renewal Entrance Scholarship (2008 & 2010)*Leadership:* Undergraduate Co-President, Schulich Real Property Students' Association*Study Abroad:* National University of Singapore (2012)

## EXPERIENCE

### INVESCO REAL ESTATE

New York, NY

*Global real estate investment management firm with over \$80B of AUM*

2020

**Asset Management Intern** (June-August 2020)

- Created and implemented property-level operational strategies and analyzed major leases, capital projects, and other investment factors impacting asset values across investment strategies and property types in Northeast US region
- Developed valuation models and client reporting deliverables, communicated with third party property management and leasing teams, evaluated lease submittal packages and tenant credit, and assessed new property technology offerings

### FASKEN MARTINEAU DUMOULIN LLP

Toronto, Canada

*International law firm with more than 700 attorneys and 10 offices on four continents*

2014-2019

**Real Estate Group, Associate** (2016-2019), **Articling Student** (2015-2016), **Summer Student** (2014)

- Advised US, Canadian and international clients on acquisitions, financings, commercial leasing, and dispositions of office, retail, industrial, and multi-family properties as well as entitlements, development approvals and planning compliance
- Led and managed a team of articling students in the due diligence analysis of over 25 major retail leases to facilitate a \$500M+ sale of a shopping center by the real estate arm of one of Canada's largest pension funds
- Negotiated over 10 commercial leases for a global coffeehouse chain company with annual revenues exceeding \$26B
- Served as a member of firm's Law School Liaison Committee, conducting students interviews and participating in career seminars and workshops, and mentored inner-city high school and law school students through Law in Action Within Schools and the University of Toronto Alumni Mentorship Program

### HOMELIFE LANDMARK REALTY INC.

Toronto, Canada

*Full-service real estate brokerage with over 1,300 sales professionals*

2008-2015

**Broker** (2012-2015), **Salesperson** (2008-2012)

- Advised clients on the purchase, sale and leasing of residential homes and condominium apartments
- Conducted compliance review and revision of office policies (including FINTRAC anti-money laundering procedures), employment contracts (including manager and independent contractor agreements), and purchase and sale agreements

## ADDITIONAL INFORMATION

*Work Authorization:* STEM MBA, 3 year OPT eligible; TN visa eligible*Certifications & Skills:* ARGUS Enterprise, VTS, Yardi, Microsoft Excel/Word/PowerPoint*Languages:* Mandarin Chinese (native speaker)*Professional Memberships:* Urban Land Institute, NAIOP*Interests:* Snowboarding, cycling, photography, cooking, exploring NYC's food culture

## EDUCATION

**COLUMBIA BUSINESS SCHOOL**  
MBA, Executive Program. May 2022

New York, NY  
2020-2022

**SWARTMORE COLLEGE**  
BA, Economics, May 2012

Swarthmore, PA  
2008-2012

*Minor Statistics*

*Varsity Soccer: Centennial Conference Academic Honor Roll*

## EXPERIENCE

### DB PARTNERS

*Founded a Real Estate Development & Construction Management Firm*

New York, NY  
2019-Present

- Real estate development project management services Seritage Growth Properties (ticker SRG)
- Services include underwriting, due diligence, design management, and construction management

### WEWORK

**Senior Director of Development** (2019)

New York, NY  
2018-2019

- Responsible for the P&L of WeWork Construction LLC, a general contractor acquired by WeWork in New York City
- Built over 1.4 million square feet of retail, a food laboratory, and office space
- Managed \$247 million in capital expenditures
- Hired 28 employees
- Managing a team of 112 staff in New York

**Director of Construction** (2018-2019)

San Francisco, CA

- Launched a general contracting business in California and Washington with offices in Los Angeles, San Francisco and Seattle
- Hired 31 employees

### OWOW REAL ESTATE DEVELOPMENT

**Director of Development** (2017-2018)

Oakland, CA  
2017-2018

- Lead the development strategy for five multi-family developments in Oakland totaling 331,000 Square Feet
- Obtained entitlements and city approval for sites in Oakland

### WEWORK

**Senior Project Manager** (2016-2017)

Mexico City, MX  
Los Angeles, CA  
New York, NY  
2013-2017

- Designed and built over 173,000 Square Feet for WeWork in Los Angeles and Mexico City
- Managed over \$24,000,000 in project expenditures

**Project Manager** (2013-2016)

- Designed and built over 210,000 Square Feet in Los Angeles, San Francisco, San Jose, New York City, Seattle, and Austin
- Managed over \$38,000,000 in project expenditures

**Junior Project Manager** (2013-2014)

- Reduced procurement expenditures by \$1,800,000 through negotiations and new partnerships with vendors
- Raised over \$70,000 for WeWork events

### KEYSTONE RISK

**Analyst** (2012-2013)

Conshohocken, PA

## ADDITIONAL INFORMATION

*Awards:* 2018 WeWork Excellence Award Winner (50 awarded at the company)

*Certifications:* Revit for Construction and Design from Autodesk

*Languages:* Farsi

*Interests:* Real Estate Association, Investment Banking Club, Private Equity Club, and Football Club

**EDUCATION****COLUMBIA BUSINESS SCHOOL****MBA**, Real Estate, May 2022

New York, NY

2020-2022

*Honors:* Columbia Fellow Merit Scholarship, Forte Fellow*Member:* Real Estate Association, AVP Prospective & Alumni- Columbia Women in Business, Hermes Society, Nonprofit Board Leadership Program, Green Business Club, Health & Wellness Club**THE UNIVERSITY OF MICHIGAN****BA**, Economics and Organizational Studies, April 2017

Ann Arbor, MI

2013-2017

*Honors:* The National Society of Collegiate Scholars, University Honors, James B. Angell Scholar, Phi Beta Kappa National Honors Society, High Distinction*Leadership/Internship:* Research assistant for study on the psychology of prejudice and inequality, Event committee lead for Organizational Studies advisory board, Liberty Mutual Summer intern**EXPERIENCE****THE BOSTON CONSULTING GROUP****HR Analyst** (2019-2020)

Boston, MA

2019-2020

- Independently learned Microsoft PowerBI data visualization tool and introduced it to team, maintained dashboards to equip team with accessible and up-to-date employee metrics that were previously unavailable or time-consuming to attain
- Conducted analysis of annual employee survey results for ~1300 Global Services employees across 10 functions and 6 global hub offices, created and presented PowerPoint decks to HR Business Partners and Office leads
- Brainstormed modifications to HR policies and programs leading to improved employee experience
- Analyzed year-end performance ratings of ~1300 global employees and presented results to leaders ensuring business meets performance targets across employee levels and locations
- Created tool to translate HR system fields and terminology to the logic and terminology of Workday system prior to implementation, built survey and analyzed results during Workday testing for employees globally and across business systems
- As a member of the BCG Green Team, managed renewable energy project, and collaborated on office-wide sustainability initiatives such as providing reusable silverware, reducing food waste, and introducing composting throughout the building
- Nominated and selected as an ally to support the local PRIDE network and demonstrate commitment to diversity and inclusion

**LIBERTY MUTUAL INSURANCE****Talent Delivery Team Specialist- HR Development Program Associate** (Oct 2018-Jan 2019)

Boston, MA

2017-2019

- Supported business leaders through talent related annual processes with delivery of succinct reports and quality analysis
- Completed and presented survey analysis, executed talent forums, and created career development resources

**Talent Analytics Analyst- HR Development Program Associate** (Feb-Oct 2018)

- Worked as internal consultant to improve efficiency of various HR business groups, e.g. used cost and quality of hire data to identify optimal number of interviews per candidate for the Experienced Talent Acquisition Group
- Built queries and pulled reports from SAS, PowerBI, and Taleo to manipulate data and fulfill HR data requests from across the business, maintained exemplary turnaround time on data requests
- Created and led Excel training to improve Excel skills of ~30 HR professionals, which was repurposed and offered to additional HR teams

**Experienced Talent Acquisition Project Manager- HR Development Program Associate** (Jun 2017-Feb 2018)

- Developed project timelines, led meetings, and wrote and distributed communications leading up to implementation of a mentorship program for Veteran employees
- Planned various events for Employee Resource Groups including a Veteran's Day Event featuring a Tuskegee airman with 100+ attendees and a Pride event hosting an LGBTQ speaker with 50+ attendees

**ADDITIONAL INFORMATION***Certifications & Skills:* SAS, PowerBI, 200 hr Yoga Teacher Certification*Volunteer Work:* Tutoring Plus of Cambridge Tutor, Falmouth Road Race Charity Runner*Languages:* Proficient in Spanish*Interests:* Running charity road races, Yoga for healing and mental health, Environmental Sustainability

## EDUCATION

### COLUMBIA BUSINESS SCHOOL

New York, NY

**MBA Candidate**, Focus on Real Estate

2019-2021

*Honors and Awards:* Real Estate Circle Fellow, Columbia Fellow Merit Scholarship, Dean's List

*Leadership and Clubs:* VP Trips, Columbia Real Estate Association; Columbia and NYU Teaching Assistant (Real Estate Finance, Real Estate Transactions, and Distressed Real Estate Investing); Urban Land Institute Member

### UNIVERSITY OF NORTH CAROLINA

Chapel Hill, NC

**BS**, Business Administration; **BA**, History; Minor, German

2008-2012

*GPA:* 3.9/4.0 | *GMAT:* 750

*Honors:* Highest Distinction, Honors Thesis, Phi Beta Kappa, Summer Undergraduate Research Fellow, Phillips Ambassador

*Study Abroad:* WHU Otto Beisheim (Fall), Chinese University of Hong Kong (Summer), and GLOBE Immersion (Summer)

## EXPERIENCE

### DRAKE REAL ESTATE PARTNERS

New York, NY

*Real Estate Private Equity Fund*

Summer-Fall 2020

#### **Acquisitions Summer Associate – MBA Internship**

- Underwrote investment opportunities across multiple asset types by analyzing market trends and conditions
- Developed comprehensive valuation models and prepared investment committee memos
- Prepared detailed comparative analysis of Drake's target investment markets and presented findings to leadership team

### O-ZONE PARTNERS

New York, NY

*Opportunity Zone Fund*

2019-2020

#### **Associate – Pre-MBA/In-Semester Internship**

- Analyzed Opportunity Zone investment opportunities by constructing financial models, researching local market dynamics, and comparing the proposed projects to other properties in the area
- Prepared investment memos, assisted in deal diligence, and reviewed transaction documents
- Developed investor relations materials and participated in fundraising activities

### KYNIKOS ASSOCIATES

New York, NY

*Short-Focused Equity Hedge Fund*

2015-2019

#### **Research Analyst**

- Formulated short and long theses on companies operating in the technology, media, and consumer spaces
- Developed primary research by monitoring industry publications, reviewing company filings, and creating financial models
- Presented investment memos to the firm's PMs and maintained coverage of portfolio companies and focus industries
- Met with management teams, engaged with sell-side analysts, and participated in industry conferences to gauge market sentiment on companies and industries

### LJ HOOKER CORPORATION

Sydney, Australia

*Australian Residential Real Estate Agency*

2013-2014

#### **Project Officer**

- Analyzed business unit performance and modeled acquisitions for LJ Hooker's Executive Leadership Team
- Assessed new business opportunities, coordinated projects across departments, and formalized sustainability reporting

### GERMAN-AUSTRALIAN CHAMBER OF INDUSTRY AND COMMERCE

Sydney, Australia

*Nonprofit Facilitating Trade Between Australia and Germany*

2012-2013

#### **Consultant**

- Conducted market research for German SMEs looking to enter the Australian market and translated company materials
- Organized diligence trips for German businesses and facilitated meetings with potential Australian business partners

## ADDITIONAL INFORMATION

*Languages:* German (Proficient)

*Skills:* Excel, Word, PowerPoint, and ARGUS Enterprise

*Interests:* Marathon Running (Seven), Trekking (Kilimanjaro and Everest Base Camp), and Traveling

# ROHAN PAREKH

M: 832-278-304 E: rpp2132@columbia.edu L: <https://www.linkedin.com/in/rohan-parekh-b60209137/> A: 235 W 48<sup>TH</sup> St NY 10036

## Education

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### Columbia University, New York, NY, United States

Degree: Master of Science in Real Estate Development [MS.RED]  
Degree: Master of Science in Advanced Architectural Design [MS.AAD]  
Honors: GSAPP Studio Work Selected for Archive & Exhibition

09 / 2020 - Present  
06 / 2019 - 05 / 2020  
Aug 2019 & May 2020

### California Polytechnic State University, San Luis Obispo, CA, United States

Degree: Bachelors of Architecture [B.ARCH]  
Honors: Top 30 Projects Award - College of Architecture & Environmental Design 3<sup>rd</sup> Year Final Presentation and subsequent award recipient.

09 / 2014 - 06 / 2019  
Mar 2017

Attended the summer course at the **Architectural Association in London** and collectively published a film called '*Hyperscape*' which received overwhelmingly positive feedback from the final jury-consisting of the honorable Madelon Vriesendorp and was published on the AA website and archive.

Jul 2017 - Aug 2017

Best Handiwork Award in the **Design Village competition** held for competing West Coast Architecture Universities, to design a livable structure which can be assembled and disassembled on site.

Apr 2015

### Abroad

Initiative: Participated in **Academic Initiates Abroad Rome(AIA)**, for the first half of my 4<sup>th</sup> year, and spent the second half at the **Institute for Advanced Architecture of Catalonia in Barcelona(IAAC)**. We studied the tentativeness of architecture through history, and the scale of the practice.

Sep 2017 - May 2018

## Work Experience

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### Corgan Architects Associates, New York, NY, United States

05 / 2018 - 08/2018

#### Architectural Intern

- Assisted on Laguardia and John F Kennedy Airport as a part of the Aviation Design Studio. Was primarily involved in the Design Development stage- marking up, drawing, and ultimately setting up Construction Documents for Port Authority approval and meetings.
- Assisted in design exploration and concept studies for British Airways' first-class lounge, premiere class check-in, and concession spaces at JFK airport.
- Large scale contributions also included drawings of connector bridge design and multiple iterations for the same.

### Michael Graves Architecture & Design, Princeton, NJ, United States

06 / 2016 - 08/2016

#### Architectural Intern

- Assisted the Architecture Design Studio working on Schematic Design, Design Development, and Construction Documents of various ongoing commercial projects, chiefly the Fannie Mae Headquarters.
- Took part in MG&AD's intern development project to develop innovative ADA based housing. Along with 4 other interns, created the ORBIS community housing proposal which addressed modular ADA housing.

### Perkins Eastman, New York, NY, United States

06 / 2015 - 09/2015

#### Architectural Intern

- Assisted in mid-sized commercial and residential projects as a part of STUDIO X.
- Assisted each team in conceptual studies and presentation research for new projects in the Schematic Development Phase.
- Assisted in Checklist Duties for project co-ordination on-site.

Total NCAARB Hours Completed : 1186.25 ~ 31%

## Skills

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### Software

- Digital Modelling, Drawing & Rendering: Rhino, Revit, 3DS MAX, Auto CAD, Sketch Up, Cinema 4D & Vray
- Adobe: Illustrator, InDesign, Premiere Pro & Photoshop
- Microsoft Office (Excel, Powerpoint, Word)
- Physical Model Making

### Languages

- English, Hindi, Gujarati

## Activities / Interests

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- Skiing, Soccer, Woodworking & Making Furniture

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**EDUCATION**

**Columbia University, Graduate School of Architecture, Planning, and Preservation**  
**Masters in Real Estate Development**

**New York, NY**  
*Expected August 2021*

**Yeshiva University, Sy Syms School of Business**  
**B.S. in Finance**

**GPA:** 3.88/4.0

**Awards:** Summa Cum Laude

**New York, NY**  
*Graduated May 2020*

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**WORK EXPERIENCE****Citigroup**

*Real Estate Finance and CMBS Summer Analyst*

**New York, NY**  
*June 2019 - August 2019*

- Underwrote potential commercial mortgage lending opportunities ranging in size from \$3 million – \$500 million and secured by office, retail, hotel, industrial, and self-storage properties across the U.S.
- Performed cash flow and rating agency analysis for various loans
- Drafted asset summary reports for credit committee and potential bond buyers
- Participated on calls/meetings with the pricing desk and bond buyers in connection with the securitization process

**Kushner Companies**

*Summer Acquisitions Analyst*

**New York, NY**  
*June 2018 - August 2018*

- Underwrote potential acquisitions of multifamily, hotel, office and retail properties ranging in size from \$30 million to \$1.6 billion
- Joined analysts and senior management on site visits to assess, as applicable, construction progress, inherent value, repositioning strategies and ongoing management
- Prepared comparative analysis reports on different properties and markets throughout the U.S.
- Analyzed rents in comparable buildings to determine market levels for the company's NYC multifamily buildings
- Participated in weekly company meetings relating to acquisition, financing and management of existing and potential portfolio properties

**Meridian Capital**

*Summer Analyst*

**New York, NY**  
*June - August 2016/2017*

- Assisted brokers in underwriting multifamily, retail, and office properties, in connection with mortgage loans as high as \$250 million
- Participated on sales calls with brokers and introduced clients to potential strategic partners
- Leveraged the firm's proprietary technology to identify potential clients and prepared databases which segregated those clients by geography, property type and other factors
- Enhanced lead management and customer relationship management (CRM) systems creating a log of communications and historic refinancing rates for over 2,000 properties in the New York area
- Participated in a two-week-long training program focused on real estate finance industry and company strategy

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**ENTREPRENEURIAL EXPERIENCE****Roomz Technologies**

*Co-Founder/CEO*

**New York, NY**  
*July 2018 - Present*

- Co-Founder and CEO of a start-up company focused on leveraging technology in the student housing industry through a mobile application and a website
- Involved with all aspects of the business, including strategy, financing, website/app development, strategic partnerships and marketing

**Monetics**

*Business Development and Operations Intern*

**Remote**  
*May 2020 - July 2020*

- First hire to the team and worked under the CEO involving all things business related
- Assisted with sales relating to companies such as Blackstone, Tishman Speyer, Metlife, Angelo Gordon and many other real estate private equity companies
- Prepared marketing materials for sales and venture raises

**Ground Up Ventures**

*Campus Partner*

**New York, NY**  
*February 2019 - June 2019*

- Member of a group of college students (from all over the U.S.) that work with an early stage venture capital fund to source investment opportunities, consult with portfolio companies, and attend local start-up events
- Responsible for sourcing over 30 opportunities; more than any other participant in the group

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**ACTIVITIES****Yeshiva University Golf Team**

*Winter 2018 - Spring 2020*

- Participated in practice two to three times a week and played in matches

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**ADDITIONAL INFORMATION**

**Skills:** Excel (Real Estate & Financial Modeling), PowerPoint, Word

**Interests:** Investing (venture capital, stocks, sports tickets), Golf, Hockey, Travel

# OLIVER SCHWALBE

250 East Houston ▪ New York City, NY 10002 ▪ 917-816-4299 ▪ Osschwalbe42@gmail.com

## EDUCATION

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### Columbia University, Graduate School of Architecture, Planning, and Preservation

New York, NY

*M.S in Real Estate Development (MSRED Candidate)*

September '20 – Present

### Harvard University, Graduate School of Design

Cambridge, MA

*Introduction to Architecture*

June '17 – July '17

### New York University, School of Professional Studies

New York, NY

*Tisch Institute for Sports Management, Media and Business*

May 2017

*Schack Institute of Real Estate- Unofficial Minor*

- GPA: 3.63 / 4.0 - Deans List for Academic Achievement

### New York University

Prague, Czech Republic

- Studied abroad in the fall semester of my senior year

August '16 – December '16

### New York Real Estate Institute

New York, NY

- Licensed New York State Real Estate Salesperson

August '14 – October '14

## WORK EXPERIENCE

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### Midtown Equities

New York, NY

*Associate – Real Estate Acquisitions*

June '18 – Present

- Sourced and originated numerous acquisition opportunities with an emphasis on off-market deals through a culmination of leads ranging from brokers, landlords, cold calls, canvassing, and tenant relationships
- Created foundation and built relationship for a JV with a long time owner of neighboring properties in Greenwich Village
- Raised equity and partook in arranging the capital stack for the redevelopment of 10 South Street aka BMB with Cipriani
- Facilitated tours of the Empire Stores in DUMBO to potential tenants as well as LP's and strategic partners

### Hilson Management Corporation

New York, NY

*Analyst – Real Estate Family Office*

September '17 – April '18

- Assisted with the 1031 exchange disposition/acquisition process
- Performed due diligence on potential Office/Retail and Multifamily opportunities across submarkets within Tri-state area
- Mapped out framework of a receiving corner site within the portfolio through an extensive assemblage with air rights to eventually be acquired and developed as a mixed-use skyscraper

### Eastdil Secured, LLC.

New York, NY

*Summer Analyst – Real Estate Investment Sales*

June '16 – August '16

- Evaluated and underwrote over \$1.2 Billion worth of commercial real estate equity transaction opportunities across various asset classes and numerous submarkets within New York City
- Reviewed leases and collected due diligence materials in order to build Argus models for office and retail transactions
- Prepared pitch books, proposals, and offering memorandums for clients

### Citigroup Inc.

New York, NY

*Summer Analyst – Real Estate Finance & CMBS*

June '15 – August '15

- Underwrote \$770mm of commercial real estate loan opportunities across all asset classes nationwide for conduit financing
- Prepared Asset Summary Reports for internal approval, rating agencies, and bond buyers

### Adams & Company, LLC.

New York, NY

*Associate – Brokerage and Management*

February '15 – April '15

- Served and understood client needs and provided appropriate commercial real estate plans
- Showed clients office space after thorough examination on CoStar and market research

### G2 Investment Partners

New York, NY

*Summer Analyst – Hedge Fund*

May '14 – August '14

## LEADERSHIP

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### Stern Real Estate Group

New York, NY

*Member*

September '14 – May '17

### Chabad House Bowery

New York, NY

*President Emeritus*

January '14 – Present

- Chaired and directed the activities of the organization's Student Board, helped manage \$2.2 Million annual student budget

**Active Membership – AIPAC, UJA, YJP, JBN, ICSC**

## SKILLS, ACTIVITIES & INTERESTS

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**Languages:** Conversational Hebrew

**Computer Skills:** Excel, PowerPoint, Basic Argus

**Interests:** Sports, Fitness Training, Micro Breweries, Broadway Shows, Skiing, Golf (handicap - work in progress)

**Other:** Understand the ticket market (frequent seller and buyer of sports tickets), Back-to-back NYU Intramural European handball champion, Sneaker enthusiast (collector, buyer, and reseller), Applied for NBA League draft



**EDUCATION****COLUMBIA BUSINESS SCHOOL****MBA**, Real Estate, May 2021

New York, NY

2019-2021

*Leadership:* VP of Finance - Real Estate Association, AVP of Finance - Jewish Business Students Association*Member:* Private Equity/Venture Capital Club, Columbia Student Investment Management Association, Basketball Club**YESHIVA UNIVERSITY, SYMS SCHOOL OF BUSINESS**

New York, NY

**BA**, Accounting, May 2012

2008-2012

*Honors:* Dean's List every semester, Dean's Award for Service and Character, Siegbert, Manfred, & Mignon Fischel Award*Leadership:* Elected Treasurer and Secretary of Student Government, NCAA Student-Athlete - Cross Country**EXPERIENCE****CHARNEY COMPANIES**

New York, NY

**Real Estate Intern**

Fall 2020

- Perform financial analysis on potential multifamily acquisitions and development opportunities including creating financial models, construction budgets, complex waterfall analyses, and research rules regarding zoning entitlement
- Collaborate with principals on structuring new value-add fund that takes advantage of discounts on asset prices in NYC due to Covid-19. Advise on OM and marketing materials, and liaise with lawyers and accountants on formation documents

**BEACHWOLD RESIDENTIAL**

New York, NY

**Real Estate Acquisitions Intern**

Summer 2020

- Performed investment due diligence and underwriting for a leading real estate private equity firm, focused on core and value-add national multifamily properties in the \$50-\$150M value range
- Conducted market and financial analysis that led to acquisition of 152 apartment unit complex in Tampa MSA; put together investment strategy, highlights, rationale, and investor presentation
- Researched market conditions and comparable properties to assist the team in understanding trends and demographics of potential markets/submarkets and developed investment thesis for acquisitions
- Reviewed and analyzed proformas, financial statements, third party reports, and market studies to help determine project feasibility and financial returns, and prepared investment memos on findings

**TJNS CAPITAL** *Venture capital firm that invests in early stage technology companies*

New York, NY

**Senior Associate** (2019), **Associate** (2018)

2018-2019

- Conducted diligence for a Series Seed round of financing for Truebird, a robotics Coffee company, wrote investment memo, alerted the General Partner of potential concerns, and coordinated with counsel on transaction documents
- Sourced deal flow, identified and analyzed market trends, and negotiated and executed investments
- Raised over \$1M from investors for seed VC Fund investing in early stage technology companies
- Oversaw follow-on investment in Lyft, pitched investment thesis to potential investors, and coordinated execution
- Co-led deal Series A preferred financing for Negotiatius, a provider of spend management and procurement software for mid-market companies, and convinced the founder to open a spot for TJNS after the round had already been closed out

**THE CARLYLE GROUP** - Carlyle Strategic Partners

New York, NY

**Junior Analyst**

2016-2018

- Reviewed capital call, distribution, and management fee calculations prepared by fund administrator
- Aggregated historical investment performance data and prepared fundraising deck working with investor relations and deal team to help close Carlyle's fourth fund at \$2.5B
- Analyzed and reviewed valuations models prepared by deal teams to support deal execution & reporting accuracy
- Managed the fund's cash balances & LOC (\$1.25B) facilitating borrowings directly with lending banks to optimize fund flows

**PWC** - Financial Services Industry

New York, NY

**Experienced Associate** (2013-2014), **Associate** (2014-2016)

2013-2016

- Prepared and reviewed financial statements of PE Funds including TowerBrook Capital Partners and Bear Stearns PE Funds
- Assessed risk through analysis of financial statements, business processes, and accounting systems
- Oversaw capital allocations and distributions, journal entry tests, realized/unrealized gains/losses, and management fees

**FORTRESS INVESTMENT GROUP** - Drawbridge Special Opportunities Fund

New York, NY

**Intern**

2012-2013

- Ran daily reports for DBSO entities to prepare profit and loss statements
- Performed root cause analysis on daily interest expense, profits and losses, realized gains, and market value discrepancies
- Finalized daily profits and losses with detailed information on fund activities, and reviewed with senior management

**ADDITIONAL INFORMATION***Interests:* Finished 2017 2XU NYC Triathlon in 2:58:59, ran 2012 ING Miami Marathon in 3:52:52, Lakers, Stock Market

## EDUCATION

### COLUMBIA BUSINESS SCHOOL

**MBA**, May 2021, Dean’s List (x2)

GMAT: 750

New York, NY

2020-2021

*Leadership*: Peer Advisor (Cluster Lead), Teacher’s Assistant – Advanced Real Estate Seminar (Spring 2021), General Management Association VP of Company Relations & Events, Hermes Society, UNC Keenan-Flagler Real Estate Case Study 2020, Pangea Social Enterprise Consulting Project (delayed due to Covid-19, to be completed spring 2021)

*Club Membership*: Real Estate Association, Private Equity Club, Investment Banking Club, Government and Business Club, Football (Soccer) Club, Golf Club, Outdoors Club, Snowsports Club

### MIDDLEBURY COLLEGE

**BA**, Economics, May 2013 (*Minors*: Math, Music)

GPA: 3.5, Cum Laude

Middlebury, VT

2009-2013

*Varsity Cross Country*: NESCAC All-Academic Team (x2), Varsity Letter Winner (x2), NESCAC All-Sportsmanship (x1)

## EXPERIENCE

### BROOKLYN NAVY YARD DEVELOPMENT CORPORATION

**MBA Intern**

Brooklyn, NY

Summer 2020

- Performed internal and external stakeholder interviews, market research, and comparables analyses to develop and recommend strategic client mix and roadmap to execution for \$477M master planned real estate development

### RLJ LODGING TRUST

*\$4B NYSE-listed hotel REIT*

**Associate** (2020)

Bethesda, MD

2018-2020

- Directed the corporate finance component of bi-annual strategic portfolio review, leading to transformational repositioning of the company, including sale of 47 hotels (31% of portfolio)
- Led cross-functional teams through successful execution of over \$800M in hotel transactions and \$1.7B in debt refinancing
- Initiated company-wide lunch and learn series and led first session on “Hotel Finance and Capital Markets”

### Senior Financial Analyst (2018-2019)

- Developed benchmarking and DCF analysis of 8-hotel portfolio to facilitate negotiations with hotel management company and secure \$35M cash termination payment to RLJ
- Enhanced strategic planning process by rebuilding, optimizing, and enhancing functionality of corporate model, enabling more agile and informed decision-making for CEO and CFO

### STORMONT HOSPITALITY GROUP

*Regional leader in full-service hotel development*

**Development Associate**

Atlanta, GA

2017-2018

- Directed entire hotel development process, including business development, underwriting, discussion and negotiation with third party service providers, and preparation of investment packages, to win projects totaling \$350M in development costs
- Led hotel management team through hotel opening and stabilization, realizing 39% cash flow outperformance over projections

### DELOITTE TAX LLP

**Senior Consultant, Global Transfer Pricing** (2015-2017)

Atlanta, GA & Boston, MA

2013-2017

- Managed and trained teams of consultants and senior consultants to deliver projects amounting to \$1M+ in annual revenue
- Executed valuation and global IP restructuring of \$8B media company, realizing \$400M in expected lifetime tax savings
- Initiated, gained buy-in for, and directed new hire training program, resulting in increased team utilization and retention

### Consultant, Global Transfer Pricing (2013-2015)

- Implemented transfer pricing analyses for tax compliance and planning purposes, including benchmarking analyses, DCF valuations, shared services allocation analyses, and R&D cost sharing arrangements

## ADDITIONAL INFORMATION

*Languages and Skills*: Intermediate Spanish, Basic Python, Basic Tableau

*Volunteerism*: Middlebury Alumni Mentoring Program, Urban Land Institute project volunteer and former committee member, pro bono & fee-based financial consulting for real estate developers

*Interests*: Playing and writing music (with one album on Spotify), running (sub 3-hour 2019 Boston Marathon finisher), exploring new cultures and cities (30 countries visited, including favorites of India, Peru, China, and Portugal)

# ELLIOT MICHAEL SHAHERY

elliotshahery@gmail.com | (310) 808-8480  
Los Angeles, CA | New York, NY

## EDUCATION

<b>Columbia University</b>	<i>Master of Science in Real Estate Development</i> Involvement: Columbia Design Driven Development Club, Hospitality Development Club, Real Estate Private Equity Club, and the International Real Estate Investment Club	August 2021
<b>The University of Texas at Austin</b>	<i>Bachelor of Science in Advertising</i> <i>Certificate in Real Estate and Land Development</i> Overall GPA: 3.82 Involvement: McCombs Business School Real Estate Club, Longhorn Industries Group (VP), Undergraduate Real Estate Society, Phi Gamma Nu Business Fraternity, Zeta Beta Tau Fraternity	May 2020

## EXPERIENCE

<b>Redcar Properties</b> – <i>Acquisition and Development Intern</i> ; Santa Monica, CA	June 2019 – August 2019
<ul style="list-style-type: none"><li>Analyzed opportunities in creative office and industrial mixed-use properties through financial modeling and sensitivity analysis</li><li>Consolidated construction loan and refinancing proposals up to \$70MM for various development projects</li><li>Developed project summary sheets and construction postmortems on completed and pre-development projects</li><li>Proposed design and material changes during meetings with project architects</li><li>Prepared investment memos and sat in on weekly investor pitch meetings for Redcar Fund I, with achieved raise of \$412M</li></ul>	
<b>Austin City Realty</b> – <i>Licensed Real Estate Agent (License Number: 695858)</i> ; Austin, TX	November 2017 – Present
<ul style="list-style-type: none"><li>Highest grossing agent in entire company from Spring 2018 to Spring 2019</li><li>Identify living accommodations for clients through apartment and housing databases</li><li>Communicate with realty companies and tenants to schedule property showings for clients</li><li>Facilitated over 150 lease signings to date through personal network and cold calls, annualizing over \$850K in rent</li></ul>	
<b>Monarch Realty Holdings</b> – <i>Assistant Property Manager</i> ; Los Angeles, CA	June 2016 – August 2016
<ul style="list-style-type: none"><li>Aided in managing two 150-unit mixed-use buildings in Los Angeles by touring open units and facilitating needed repairs</li><li>Negotiated lease terms with prospective tenants and managed rent rolls for landlord</li></ul>	

## LEADERSHIP AND ACTIVITIES

<b>Moody College of Communication Dean's High Honor List</b>	Spring 2018 – Spring 2020
<b>McCombs School of Business Real Estate Student Spotlight Award</b>	Spring 2020
<b>Undergraduate Real Estate Society</b> – <i>Member</i>	October 2017 – May 2020
<ul style="list-style-type: none"><li>Attended panels and participated in small group discussions hosted by acclaimed real estate professionals</li><li>Participated in Breaking Into Wall Street (Excel training course) and ARGUS certification courses</li><li>Attended career fairs to expand professional network and develop greater understanding of the industry</li></ul>	
<b>Phi Gamma Nu Business Fraternity</b> – <i>Member</i>	October 2017 – May 2020
<ul style="list-style-type: none"><li>Engaged in professional, philanthropic and social events to help develop business intelligence and establish a deeper network</li><li>Part of Founding New Member Class for University of Texas chapter</li></ul>	
<b>Longhorn Industries Group</b> – <i>Vice President</i>	September 2016 – May 2020
<ul style="list-style-type: none"><li>Benchmarked local businesses by conducting market research and cashflow analysis then presented findings to group</li><li>Coordinated and ran semesterly “Shark Tank” event where members presented their research and pitched to mock investors</li><li>Facilitated weekly meetings and provided guidance to members on their pitches and company research</li></ul>	

## ADDITIONAL INFORMATION

**Computer Skills:** ARGUS-certified, Microsoft Office Suite, Final Cut Pro, Adobe Acrobat, Photoshop, Illustrator  
**Languages:** Fluent in Hebrew, Proficient in Spanish, Conversational in Farsi  
**Interests:** Snowboarding, Surfing, Basketball, Tennis, Golf, UT Football, Curating Music, Travel, Backpacking

## EDUCATION

### COLUMBIA BUSINESS SCHOOL

**MBA**, Real Estate & Finance, May 2022

New York, NY  
2020 – 2022

*Leadership:* AVP of Careers for Real Estate Association, AVP of Events for Hospitality & Travel Association, Social Chair for Cluster H (Student Government), Admissions Ambassador for Hermes Society, Nonprofit Board Leadership Program

*Club Membership:* Private Equity Club, Social Enterprise Club, Wine Society, Sailing Club

### NEW YORK UNIVERSITY

**BA**, Economics & Business Studies, May 2014

New York, NY  
2010 – 2014

*GPA:* 3.5/4.0

*Leadership:* VP of NYU Transfer Student Association, International Ambassador for NYU Senator's Council, Career Advisor

*Study Abroad:* Architecture and Economics at NYU in Florence, Villa La Pietra, Florence, Italy (Spring 2013)

## EXPERIENCE

### JPMORGAN CHASE & CO

Boston, MA & New York, NY

**Executive Director & Client Manager, Commercial Real Estate** (2017 – 2020)

2014 – 2020

- Led group's Boston office overseeing a portfolio with a \$1.4B capitalization, closed over 200 transactions with volume of \$650M, and managed the relationships of 150 clients consisting of real estate investors, family offices, developers & funds
- Achieved perennial record loan production and ranked in top quartile in country; grew loan portfolio over 90% in 4 years
- Sourced new business, negotiated deal terms, managed a 4-person deal team, engaged with local media, partnered with colleagues across business lines, senior management, credit executives, and others to drive results for the business
- Spearheaded relaunch of bank's Fannie Mae program by executing first such deal in the country in over 10 years; collaborated with 15 other employees across business functions
- Co-Chaired firm's largest business resource group that provides leadership development for early career professionals, guided a team of 12, worked directly with members of firm's Operating Committee and increased membership by 50% to 25K in 2 years
- Earned fast-track promotion from Analyst to Executive Director in slightly over 3 years, becoming one of the youngest employees at the firm to earn this title

**Vice President, Commercial Real Estate** (2017)

- Originated over 25 transactions with volume of \$100M in new commercial loans to the bank, including largest transaction to ever fund in Boston, a \$45M refinance of 10 buildings
- Managed a 2-person deal team and executed on a range of business development activities bringing in in top-tier real estate investors as clients to the bank
- Launched multifaceted marketing and media campaign to expand Chase brand awareness and position the business as a preeminent multifamily lender in the market

**Associate, Commercial Real Estate** (2015 – 2017)

- Commissioned by senior management to expand the group's regional footprint by relocating to Boston and executing on a business development strategy, building out a team, and implementing a marketing plan
- Collaborated with several sales teams by assisting in all aspects of the loan process including the funding of over \$400M in commercial real estate term loans throughout New York City and Boston
- Took on an active role with the firm's talent recruitment initiatives; sourced 3 new hires to fill key roles for the group's sales team and served as representative for the CRE business for the firm's New York University on-campus recruitment

**Analyst, Commercial Real Estate** (2014 – 2015)

- Assisted ten senior executives on deal flow with underwriting, inspecting properties, and preparing deal memos
- Underwrote largest transaction ever closed for the Northeast at the time - a \$155M refinance of a 12-building portfolio

## ADDITIONAL INFORMATION

*Certifications:* Certificate in Hotel Real Estate Investments & Asset Management (Cornell School of Hotel Administration; Issued Spring 2020)

*Skills & Trainings:* Argus Enterprise (beginner)

*Languages:* Russian (fluent)

*Interests:* Hotels (TWA Hotel), competitive running (Ragnar Relay), and entrepreneurship (co-founded food vendor business that served traditional Russian dumplings with American inspired toppings)

**EDUCATION****COLUMBIA BUSINESS SCHOOL****MBA**, Real Estate, May 2021

GMAT: 720

New York, NY

2019-2021

*Leadership:* Co-President (Real Estate Association, elected by 200+ peers), Cluster Chair (elected by 70 peers and manage \$16K student programming), VP Finance (Government & Business Club), Lead Peer Advisor for 70 students

*Member:* Columbia Women in Business, CBS Reflects, and Microbrew Society

**CORNELL UNIVERSITY****BS**, Industrial & Labor Relations, May 2016

GPA: 3.92

Ithaca, NY

2012-2016

*Minors:* Business, Inequality Studies

*Honors:* Dean's List - All Semesters

*Leadership:* President, Industrial and Labor Relations Global Affairs Club (2015-2016)

*Study Abroad:* Lorenzo de' Medici Institute, Florence, Italy (Spring 2015)

**EXPERIENCE****HINES**

New York, NY

**MBA Summer Intern**

Summer 2020

- Built model to forecast project and partnership returns on \$445M office development in Hudson Square
- Performed comparative analysis between current and prior construction management agreements (CMAs) with general contractor to inform negotiation positions on CMA for \$2.3B office development on Madison Square Park
- Leveled bids by tracking discrepancies between vendors for carpentry and temporary protection trades
- Analyzed life sciences market opportunity for equity partners review to inform leasing and construction decisions
- Undergraduate intern mentor; created financial modeling training including teaching materials and deal analysis templates

**SIMONE DEVELOPMENT COMPANIES (SDC)**

New York, NY

*A full-service commercial real estate development and investment company with 6M sf portfolio.*

2015-2019

**Project and Leasing Associate (2016-2019)**

- Managed joint venture project with \$45M construction budget for development of mixed-use commercial property, built-to-suit for City of New Rochelle Department of Public Works and LA Fitness
- Performed due diligence through construction for 180K sf facility; conducted feasibility studies, site plan development, pro forma & budget review, permitting and zoning, and project bidding
- Created financial model for lease deal underwriting that was implemented within the leasing department
- Increased occupancy by 6% in repositioned medical and professional Class A office portfolio, outperforming market trends
- Built and presented \$40M annual revenue budget for core portfolio to prioritize principals' investment decisions
- Negotiated up to 100K sf leases from term sheet to closing with prospective tenants' attorneys
- Conducted annual analysis to ensure actual operating expenses did not exceed fixed amount charged to tenants; identified high cost line items and worked with property management team to recognize future cost-savings
- Selected to represent SDC at community, charitable and political functions including those hosted by Urban Land Institute, Westchester Democratic Committee, Building Owners and Managers Association, and UJA Federation of New York

**Real Estate Intern (Summer 2015)**

- First intern ever hired full-time post-graduation; new position created after completing rotational program through all departments, including Development, Leasing, Property Management, Accounting and Legal
- Developed a standardized system for market research data collection, implemented within the leasing department

**U.S. HOUSE OF REPRESENTATIVES****Intern, Office of Congresswoman Nita Lowey, House Committee on Appropriations**

Washington D.C.

Summer 2014

**EXECUTIVE CHAMBER, STATE OF NEW YORK****Intern for Governor Andrew Cuomo**

New York, NY

Summer 2013

**ADDITIONAL INFORMATION**

*Certification:* Completed Argus Software's Argus Enterprise Training Course

*Volunteer Work:* Appointed to Westchester Real Estate Board for March of Dimes

*Project Destined:* Co-founded program at Columbia Business School to mentor students at Lehman College (CUNY) through Project Destined, an international real estate ed-tech non-profit with a mission to increase diversity in the real estate industry

*Interests:* Traveling to different countries to try traditional cuisines, cooking homemade pasta, board games and golf

# Larry (Junjie) Xu

505 W 37 ST, New York, NY 10018 | 347-886-0735 | [jx2421@columbia.edu](mailto:jx2421@columbia.edu)

## Education:

**M.S. in Real Estate Development** | Columbia University

Expected Graduation: Aug 2021

- Cross-registration in the MBA program

**B.A. in Philosophy** | New York University

Graduation: May 2020

- Minor in Economics

## Experience:

**Human resource intern** | Beike (ke.com) | Beijing, China

Jun 2019 - Aug 2019

- Worked in the largest real estate platform in China
- The company has over 80 Billion market value, listing on NYSE
- Joined the school recruitment team
- Helped organized the career fairs in local schools
- Collected the contact information of over 200 prospective graduates
- Categorized the online application materials of local graduates

**Housing consultant intern** | Lianjia (Real Estate) | Chengdu, China

Jun 2018 - Aug 2018

- Worked in the largest real estate brokerage company in China
- Helped customers to transfer titles in Chengdu Real Estate Trading Center
- Introduced housing transfer procedures and tax rates
- Guided customers to fill in forms and queuing
- Helped 10 customers per day on average

**Finance intern** | Lianjia (Real Estate) | Chengdu, China

Jun 2017 - Aug 2017

- Helped customers to apply for housing loans and decoration loans
- Introduced the procedures and interest rates of the loans
- Helped customers to check and understand their credit rating
- Helped customers to select suitable banks
- Helped 15 customers per day for housing loans on average
- Helped 2 customers per week for decoration loans on average

## Skills:

**Language:** Proficiency in Mandarin

**Computer:** Proficient in Microsoft Access, Microsoft Excel, Adobe Photoshop, and Sony Vegas Pro



# Florida State University

# JOSHUA FERN

(561) 601-0186 | [joshfern@me.com](mailto:joshfern@me.com)  
<https://www.linkedin.com/in/joshuajfern/>  
309 West 30<sup>th</sup> Street, New York, New York 10001

## EDUCATION

### Florida State University

Bachelor of Science (B.S.), Finance and Real Estate

Tallahassee, Florida

May 2017

### New York University, Schack Institute of Real Estate

Master of Science (M.S.), Real Estate Development

New York, New York

GPA 3.7, Expected: Fall 2020

## EXPERIENCE

### The Moinian Group

*Senior Associate, Development & Asset Management*

New York, New York

January 2018 – Present

Senior Associate responsible for new development & asset management of existing 3,000+ luxury residential unit portfolio for national developer and owner. Manage all aspects of pre-development, development, leasing, marketing, and project completion strategy.

- Supported the Moinian Capital Partners lending team through due diligence & feasibility analysis process, which enabled the team to assess potential market opportunities (NYC & Miami)
- Co-led the reporting of overall asset progress to banks and bond holders (Tel Aviv Stock Exchange, Moinian Limited) for refinancing and construction draws for the duration and stabilization of key projects
- Co-led the brokerage team selection and leasing/marketing budgets for projects resulting in over 600+ new development units to market (Oskar, 572 11<sup>th</sup> Ave – 164 rental units & PLG, 123 Linden Blvd – 467 rental units)
- Supported design and development team in decisions regarding unit-mix, floor plan layouts, affordable selections, amenity programming, and design of model units/leasing offices (1,000+ units in pipeline)
- Co-led marketing team and external agencies to create a go-to-market strategy, which delivered comprehensive PR, branding, and advertising campaigns, outside partnerships for buildings, and online experience
- Created comp analysis reports for different markets to deliver initial/renewal pricing and concession adjustments for residential units. Responsible for countersigning, negotiating, and underwriting residential leases.
- Punch-listed floors and units for move-ins and coordinated with construction teams for targeted TCO dates and phase prioritization successfully bringing units to market
- Coordinated communication between operations and property management teams to ensure vacated units were accounted for in advance and market ready for tours/move-ins
- Led project walk-throughs for various banks and bond holders to ensure successful on time delivery and satisfaction of key programs
- Served as residential lead to venture capital arm, Currency M, for evaluation and potential incubation of start-up companies for investment, including bringing new global opportunities to the United States e.g. TULU Room

### Hudson RE LLC

*Associate, Commercial Leasing & Investment Sales*

New York, New York

June 2017 – January 2018

Associate for top producing commercial broker responsible for financial analysis, data analytics, comps, and leading communications with brokers, owners, and clients. Served as co-manager of several exclusive listings.

- Focused on lead generation using various tactics including canvassing, cold calling, social media, etc., to serve a broad range of listings in Manhattan, Brooklyn, and Queens
- Originated 30+ tenants for retail listings by analyzing voids in various markets
- Managed client communications resulting in over ~85 tours
- Reviewed agreements for in process transactions and participated in negotiations
- Led and generated weekly property status reports for landlords and databased outreach resulting in the development of a robust client pipeline, which was shared with individual leadership and across the organization

## CERTIFICATIONS AND SKILLS

- NY Real Estate Broker License
- Bloomberg Terminal Certified
- OSHA Certified (10-hour course)
- Salesforce, Yardi, On-Site, Buildinglink
- Real Estate Financial Modeling Level I, II, & III Certified
- Proficient in Argus Enterprise Software
- Proficient in MS Excel, Word, and PowerPoint
- Matterport, Aeon Virtual





# Fordham University

# Jing Wang

Phone: 1-718-308-6086 | Email: Jing93serena@gmail.com

## EDUCATION

<b>Fordham University   Real Estate Finance  Master</b>	<b>GPA:3.5</b>	<b>Aug.2019- Present</b>
• <b>Major course:</b> Real Estate Financial Modeling, Real Estate Capital Market, REITs, CMBS		
<b>New York University  Real Estate Development  Master</b>	<b>GPA: 3.5</b>	<b>May.2017-Aug 2018</b>
• Major courses: Real Estate Market, Real Estate Finance, Real Estate Investment, Real Estate Legal, Development Process, Urban Planning Principles, Real Estate Project Management, etc.		
<b>Baruch College  Accounting  Bachelor</b>	<b>GPA: 3.88</b>	<b>Sept.2011-Mar.2015</b>
• Major courses: Economic Law, Tax Law, Financial Accounting, Cost Accounting, Financial Management, etc.		

## EXPERIENCE

<b>Eastern Union  Commercial Real Estate Underwriting Intern</b>	<b>June.2020-Aug.2020</b>
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*Key Projects: Multifamily- Waterside Village Project in Tampa, Florida.*

- Responsible for sourcing, market research underwriting, deal structure, and implementing acquisition to equity investment in development and value-add opportunities in project in New York, New Jersey, Florida and Dallas.
- Financial Analysis: Underwrote and executed Waterside Village project in Tampa, Florida base on financial statement, projections, and market standards to determine a projected income, value and loan amount. Provide financial analysis and Investment, location and recommendation report.
- Sales and Rental Comparable: Profit & Loss 12 Month Recap, NOI, IRR.

<b>Guangzhou R&amp;F Properties Co.Ltd. [HK:2777] Asset Management and Operation Associate</b>	<b>Aug.2018-Aug.2019</b>
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*Key Project: Asset Management of approximately 730,000sq ft of a mixed used residential,267,000sq ft of hotel accommodation and 1,000sq ft of retail space in London.*

*Acquisition a 470 million Pounds of 10.2 Acre mixed used residential and from Wanda Group in London.*

*Asset Management approximately 1,700,000sqft Shopping Center in Beijing and 1,400,000sqft Shopping Center in Guangzhou*

- Assisted the director to do location strategy, underwriting, implementing acquisition and feasibility analysis. Source and analyze the feasibility of potential development sites and evaluate associated development schemes, there are 300 sites located in China, two sites in The United Kingdom, four sites in Australia, one site in Malaysia and one site in Cambodia.
- Reviewed and reported to director all aspects of acquisitions and asset management analysis, including real estate underwriting, due-diligence, leasing, tax appeal.
- Assisting with the investment asset management process existing mix-used or shopping center in Beijing and Guangzhou. Completed data statistics and correlation analysis of real estate company classification (profit type, cash flow type, equilibrium type), scale, main profit rate, turnover rate, debt rate, cash flow, P/E ratio, etc.

<b>Evermay Enterprises  Financial Analyst</b>	<b>Sept.2016-Sept.2017</b>
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*Key project: 3 story foreclosure multifamily project in Boston.*

- Formulated and implement company's business strategies, budget plans.
- Developed companies' annual performance goals and business development strategies.
- Purchased different banks owned foreclosure properties and renovated this property in Boston area and converted it to a high yield rental property. Utilized the foreclosures house background check, like title search, permit approval, remodel construction.
- Prepared monthly sales statistics, pie chart of completion at the end of month, made analysis of the monthly price.
- Accumulated more than 400 customers. Maintained a good working relationship with the channel.
- **Achievement:**
  - The total investment is 2 million dollars, and the net income for half a year is 15%.
  - Transformed the foreclosure project into a private fund, met and negotiated with international investors interested in USD- based financial products.
  - Collected a total asset volume of 2 million USD and are offering our investor 4.5% annual interest and distribute revenue on a quarterly basis.

## ACTIVITY

<b>Urban Land New York   Member</b>	<b>2018-present</b>
<b>ALPFA  Member</b>	<b>2013- 2015</b>
<b>International Union of Friendship   Member</b>	<b>2013</b>

## SKILLS

- **Language:** Fluent in both spoken and written English; Native speaker of Mandarin.
- **IT Skills:** Argus, SketchUp, Master the use of MS Office, as Word, PPT, Excel.

## EVALUATION

- Be good at exploratory study with solid foundation of mathematics and physics, familiar with a variety of financial database. Strong ability to use statistical software to study on the situation of projects combined with industry fundamentals and historical data, as well as investment models.



# MIT Center for Real Estate

# JAMES G. GEOGHEGAN

755 Boylston Street Apt. 804, Boston, Massachusetts 02116 • (914) 772-1681 • jamesgeo@mit.edu

## EXPERIENCE

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2019 - 2020      EV INVESTMENT GROUP      New York, NY

### *Partner*

- Joined an investment group specializing in real estate and technology companies that have compelling stories and upstanding management teams
- Partnered with Connecticut Realty Trust in the redevelopment of for-lease housing in Bridgeport, CT
- Partnered with Evolv Technology in the development of fused sensor and AI technology to provide security and scanning services for real estate and places of assembly

2011 - 2018      MORGAN STANLEY

*Vice President, Risk Management: Institutional Equity Division*      2016-2018      New York, NY

- Director of New Product Risk Management responsible for managing risk and coordinating the evaluations of relevant functional areas impacted by any new products, models, strategies, and technology implementations pursued by the Americas sales and trading desks
- Initiated technological internal optimization projects for derivative and program trading desks leading to approximately \$20 million annually in exchange fee savings for the firm and clients
- Effectively managed downside risk for Institutional Equity Sales and Trading resulting in improved profitability and top revenue rankings amongst competitors in equity sales and trading
- Lead facilitator for audits between the firm's Internal Audit Division and the relevant global Institutional Equity Sales and Trading desks to assess and remediate any significant gaps in controls and processes
- Expanded the firm's premier Electronic Trading Algorithm suite by partnering with Technology to build the first low-latency, smart order router for the division's quantitative clientele and internal trading engines
- Mentored and trained colleagues within the Risk Management team

*Associate, Risk Management: Institutional Equity Division*      2013-2016      New York, NY

- Instituted and managed the Trader Mandate Exception process across the global Institutional Equity desks in order to serve as a primary control in monitoring trading behavior and activity
- Created the Americas Regional Operational Risk Management Review where external and internal operational risk incidents were reviewed with senior management and appropriate remediation project plans were implemented
- Selected by firm management to represent the Equity Division for the *Strategy Challenge* program, assessing and delivering a strategic action plan for the non-profit Bridge Street Development Corporation, a low to moderate-income housing development corporation
- Overhauled daily external client request process allowing for faster delivery of accurate information to global equity clients

*Analyst, Institutional Securities Equity Operations Group*      2011-2013      Baltimore, MD

- Managed and allocated multi-billion dollar equity trade flow daily for over 100 of the world's largest institutional clients

## EDUCATION

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2020 - Present      MASSACHUSETTS INSTITUTE OF TECHNOLOGY      Boston, MA  
*Center for Real Estate, Master of Science in Real Estate Development Candidate*  
• Member of The Sloan Real Estate Club

2007 - 2011      VILLANOVA UNIVERSITY      Villanova, PA  
*Villanova School of Business, Bachelor of Science in Business Administration in Finance, Minor in Real Estate*  
*Studied abroad at the National University of Ireland Galway, concentration in Irish Studies*  
• Member of Special Olympics Pennsylvania, Corporate Finance Society, Villanova Real Estate Society, Phi Sigma Kappa, and Villanova Day of Service

## ADDITIONAL INFORMATION

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- Community Activities: Babies Heart Fund, Bridge Street Development Corporation, Citymeals on Wheels, Part of the Solution ("POTS"), and The Bowery Mission
- Captain and manager of Young Professionals Ice Hockey Team in Chelsea Piers, Manhattan League
- Other Interests: real estate redevelopment, community service, golf, team sports and travel

# Bani Amrit Kaur

Contact: +1(617)909-9117  
E-mail: banikaur@mit.edu  
<https://www.linkedin.com/in/baniamritkaur/>

## EDUCATION

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### MASSACHUSETTS INSTITUTE OF TECHNOLOGY

Master of Science in Real Estate Development

Cambridge, USA

*Expected completion- Dec 2020*

### NATIONAL INSTITUTE OF CONSTRUCTION MANAGEMENT & RESEARCH

Post Graduate Program in Advanced Construction Management

Pune, India

2014

### CHANDIGARH COLLEGE OF ARCHITECTURE

Bachelor of Architecture

Chandigarh, India

2011

## PROFESSIONAL EXPERIENCE

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### TAURUS INVESTMENT HOLDINGS

**Boston, USA**

*Summer Intern*

*June to August 2020*

- Conducted a detailed analysis of company portfolios', across product type, to identify potential REIT pipeline in India and mapped the underlying investment opportunities and challenges for an international investor.

### TISHMAN SPEYER

**Mumbai, India**

*Winter Intern*

*January 2020*

- Acted as Morgan Stanley's client representative for the upcoming development of 0.6M sq.ft. regional office to deliver large scale commercial lease and built to suit design development optimizing capital expenditure.

### GODREJ PROPERTIES LIMITED

**Ahmedabad/NCR/Mumbai, India**

*Senior Manager*

*May 2014 to July 2019*

- Led design strategy and management of a 135-acre golf integrated mixed use development township, 'Godrej City, India', with a built-up area potential of 8M sq.ft. including master planning, phasing strategy, detailed design with construction coordination of 1.3M sq.ft. and senior stakeholder management by translating qualitative design into quantitative business returns.
- Developed a MS excel computational tool for Design Diligence evaluation to check floor space index (FSI) consumptions with array of control parameters like ground coverage, open space norms and product requirements for Mumbai market, subsequently optimizing man-hour efficiency from 3 days to 30 mins.
- Managed design for 5.7M sq.ft. residential (multi-family) development, across 5 projects, encompassing detailed construction documents, marketing collaterals, sustainability and storyboarding customer experience in Ahmedabad, Delhi NCR and Mumbai MMR regions to gain holistic multifamily real estate development exposure.
- Analyzed technical due diligence of 14 projects, independently, for optimal development potential, business profitability and design risks with mitigation- resulting in addition of 3.5M sq.ft. to company project portfolio.

### TISHMAN SPEYER

**Hyderabad, India**

*Trainee Project Analyst*

*April 2013 to June 2013*

- Collaborated to evaluate a due diligence of a 2.2M sq.ft. residential development including design, detailed market study and analysis, project costing and scheduling to understand entry into new market.

### INDER ENTERPRISES AND ENGINEERS

**Chandigarh, India**

*Architect*

*June 2008 to July 2012*

- Gained direct entrepreneurship experience with a startup - formulating standard design guidelines and documentation practices, design, construction and supervision of the first manufacturing unit.

## ADDITIONAL

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- Certified Indian Green Building Council – Accredited Professional (IGBC AP)
- Graduate teaching assistant at MIT Center for Real Estate in Leadership in Real Estate (Gloria Schunk) and Real Estate Ventures 1- Negotiating Development Phase Agreements (Tod McGrath)
- **Awards**
  - Merit scholarship in NICMAR, Pune, India and Gerald Blakeley fellowship at MIT Center for Real Estate
  - Leadership talent pool for Godrej Properties Limited, 2019.
- **Relevant course work**
  - Harvard Business School- Real Estate (RE) Private Equity, Real Property, RE Financial Modeling Workshop.
  - MIT - Corporate Finance (MIT Sloan), Capital Markets, Data Science and Machine learning, RE Development Studio, RE Finance and Investment, RE Economics, Innovative Project Delivery, RE Products, Mediating PPP, RE Ventures (Contracts), Leadership in Real Estate, Argus AE, Building Systems and Corporate Real Estate.

## EDUCATION

05.2021	MIT   Cambridge, MA, USA
	<b>Master of Science in Real Estate Development</b>
	<b>Master of Architecture</b>
	Advanced Placement + Full Tuition Fellowship
08.2017	EPFL   Lausanne, Switzerland
	<b>Bachelor of Science in Architecture</b>
09.2016	08.2017
	<b>The University of Tokyo   Tokyo, Japan</b>
	Exchange student

## LEADERSHIP EXPERIENCE

02.2019	02.2020	<b>Architecture Student Council   Co-President</b>
		MIT   Cambridge, MA, USA
08.2015	07.2016	<b>President of a team of 33 mentors to 250+ incoming architecture students</b>
		EPFL   Lausanne, Switzerland
09.2014	07.2016	<b>Students body representative</b>
		<b>Board of the School of Architecture and Civil Eng.</b>
		EPFL   Lausanne, Switzerland

## SKILLS

Software	AutoCAD   SketchUp   Rhinoceros 3D   TopSolid CAD   Photoshop   Illustrator   InDesign
Hardware	Sketching   Computer-aided manufacturing with Zünd and laser   Ceramics   DJI Drone Piloting
Languages	French (native) English   (full proficiency)   Spanish (working proficiency)   Japanese (basic proficiency)

## SELECTED AWARDS

11.2020	05.2021	<b>Stanford University   Stanford, CA, USA</b>
		<b>Stanford US-Russia Forum</b>
		Fellow in the History Working Group
10.2020		<b>Built Pavilion at the 2021 Seoul Biennale of Architecture and Urbanism   Seoul, South Korea</b>
06.2020		<b>Prize of the French National Geographic Institute</b>
		<b>French Ministry of Ecology   Paris, France</b>
05.2020		<b>1st Place   MIT DesignX 2020</b>
		MIT   Cambridge, MA, USA
05.2019	07.2019	<b>Funded Research on Prefabricated Housing</b>
		<b>MIT-Russia Program   Moscow, Russia</b>
09.2018	05.2021	<b>Full Tuition Merit Scholarship   MIT Architecture</b>
		MIT   Cambridge, MA, USA
08.2017		<b>Winner   The Best 2017 Architecture Drawings</b>
		<b>Archdaily   Online</b>
07.2017		<b>2nd Prize   Swiss Room Competition</b>
		<b>Lausanne UIA 2023 Committee   Seoul, S. Korea</b>
05.2017		<b>Winner   The Best Architecture Portfolio Designs</b>
		<b>Archdaily   Online</b>

## RELEVANT EXPERIENCE

12.2019	present	<b>Roofscapes</b>
		<b>Co-Founder   Paris, France</b>
		• Launched a startup developing green roofs to mitigate climate change in Europe
		• Led operations, communications and business development
		• Raised \$25k in research grants
		• Hired and managed 4 interns
06.2019	07.2019	<b>MIT-Russia Program and APEX Project Bureau</b>
		<b>Independent Researcher   Moscow, Russia</b>
		• Researched on the ongoing transformation of prefabricated housing in several Russian cities
		• Interviewed 30+ stakeholders in the fields of real estate, politics, construction, consulting, engineering and design
09.2017	08.2018	<b>Herzog &amp; de Meuron</b>
		<b>Trainee   Basel, Switzerland</b>
		• Part of a 5-person team responsible for the winning entry of Lombard Odier's new HQ in Geneva (70,000 sqm)
		• In charge of façade studies and Revit coordination during the SD phase of Lombard Odier's HQ
		• Developed initial studies for an urban renewal master plan in a Southern French city (5 sqkm)
		• Led the fabrication of the model for the winning entry to the Dreispitz Nord competition in Basel
02.2017	07.2017	<b>Junya Ishigami + Associates</b>
		<b>Intern   Tokyo, Japan</b>
		• Designed the initial studies of the Freeing Architecture retrospective at the Cartier Foundation in Paris, which was recognized as the best architecture exhibition of 2018 by The Guardian
		• Optimized the Cloud Arch's structure in Sydney
06.2020	08.2020	<b>4.s24 MIT Architecture Radio Workshop</b>
		<b>Instructor   MIT   Cambridge, MA, USA</b>
		• Selected to teach a summer class on non-visual design at MIT
		• Invited weekly guest lecturers (sound artists, chefs, perfume makers, art historians)
		• Commissioned French perfumers to develop a smell evoking the atmosphere of MIT's Architecture department
07.2015		<b>Voith &amp; Mactavish Architects</b>
		<b>Intern   Philadelphia, PA, USA</b>
		• Conducted solar studies for a school renovation
		• Participated in client meetings and visited construction sites
06.2012		<b>Arcurial Auction House</b>
		<b>Intern   Paris, France</b>
		• Joined the Design Department in charge of 20 <sup>th</sup> century furniture
		• Prepared the pre-sale exhibition, visited private collections and helped during the auction

# Clay Macfarlane

Los Angeles, CA | (203) 247-4025 | [macfar@mit.edu](mailto:macfar@mit.edu)

## EDUCATION

### Massachusetts Institute of Technology

Cambridge, MA

Candidate, M.S. Real Estate Development

August 2019-December 2020 (Expected)

- GPA: 5.0/5.0 | Real Estate Coursework: Agreements, Economics, Finance, Investment, Products, Studio & Systems
- *Harvard Business School (5 courses)*: RE Investment, RE Private Equity, Venture Capital, Entrepreneurship, Case Writing

### University of North Carolina

Chapel Hill, NC

B.A. Highest Honors: History | Second Major: Political Science | Minor: Environmental Studies

August 2007-May 2011

- Honors Program | GPA: 3.8/4.0 | Dean's List all semesters | Recipient of Award for Best History Thesis
- Honor Court Member, Phi Beta Kappa Honors Society, Admissions Ambassador, Club Squash

## EXPERIENCE

### Internships

- **Jamestown LP**, *Acquisitions & Technology Strategy* Summer 2020, New York, NY
  - Created report on innovation in multifamily sector for partnership, acquisition, & repositioning opportunities
  - Studied market and identified stressed/distressed opportunities for investment
- **Hines Inc.**, *Acquisitions & Global Strategy* Winter 2020, London, UK
  - Completed investment memo and underwriting model for multifamily development project
- **EQ Office**, *Acquisitions & Dispositions* Summer 2019, Los Angeles, CA
  - Analyzed redeveloping Seattle submarket and identified investment strategy, partners & properties for investment
  - Underwrote office acquisition; modeled cash flows and returns to Blackstone funds using Argus & Excel

### Blackstone

New York, NY

*Vice President | Credit (GSO) | Distressed & Special Situations Investing*

July 2013-May 2019

- 6 years of experience sourcing, diligencing, structuring, executing and managing debt & equity investments
- Experience across all industries and asset classes, with focus on real estate, real asset, and distressed transactions
- Promoted from Analyst to Associate (2015) and Vice President (2018); served on 2 corporate boards

#### Select Investing Experience:

- **Residential Homebuilder Off-Balance Sheet Financing Strategy ("CDCG")** (\$750M equity + debt invested)
  - Managed (as head analyst & board member) new deal originations & diligence, portfolio management and operations in concert with management team of wholly-owned portfolio company
  - Evaluated single-family residential development projects for new investment, deploying ~\$750 million via a special-purpose vehicle formed by GSO to invest capital alongside homebuilders on a project-by-project basis
  - Led negotiations establishing leverage facilities for Fund 4, raising ~\$350 million to achieve optimal capitalization
- **"Company A" Asset-Level Financing** (\$600M term sheet submitted)
  - Structured a non-traditional, tax-efficient, and leverage-neutral financing around the real estate assets of Company A to accommodate unique limitations, including complexity from corporate structure and cross-border business activity
  - Analyzed business model, competitive positioning and financial performance for investment committee approval
- **Distress-for-Control: Avaya, Inc.** (\$400M equity invested) and **C&J Energy Services** (\$200M equity invested)
  - Led financial analysis and company & market diligence to inform ongoing investment decisions
  - Worked closely with management and other lenders throughout Ch. 11 negotiations as Steering Committee member
- **Sorenson Communications** (\$700M equity invested)
  - Managed position (as head analyst & board member) to optimize capital structure, support business/product development and budgeting as majority owner

### Moelis & Company

New York, NY

*Analyst | Financial Advisory*

Summer 2010, July 2011-June 2013

- Supported deal teams on M&A, restructuring and debt & equity capital markets transactions across industries
- Conducted business diligence and built financial models to evaluate company operations, profitability, cash flow, capital structures and valuations in various transaction scenarios, which were used to inform views conveyed to mgmt./directors

#### Select Transaction Experience:

- **Advisor to Edison International on \$3.7B Chapter 11 Restructuring of Subsidiary Edison Mission Energy**
  - Built recapitalization and liquidity models, valuation analyses and presentations to inform negotiations and strategy
- **Advisor to Solutia, Inc. on \$4.7B sale to Eastman Chemical Company**
  - Prepared merger models and analyses for board presentations to evaluate unsolicited bid; managed diligence process

## INTERESTS

The outdoors, triathlons & marathons, LGREG, Nantucket Conservation Associates, architecture, history, photography, skiing

**DAVID MAROTI**

630 E 14<sup>th</sup> St., Apt 11, New York, NY 10009

[dmaroti@mit.edu](mailto:dmaroti@mit.edu) | (917) 755-2823

**Education**

2019-2021

**MASSACHUSETTS INSTITUTE OF TECHNOLOGY**

**CAMBRIDGE, MA**

Candidate, M.S. Real Estate Development: Finance Concentration, February 2021.

Recipient of Paul Sun Fellowship. Graduate Thesis on 'Private College Distress – Real Estate Opportunities for Investment and Redevelopment.' Graduate teaching assistant for Real Estate Finance course, fall 2020. Panel director of MIT World Real Estate Forum – ESG Investing panel.

Selected coursework: distressed investing practicum, leadership, real estate private equity and corporate financial strategy at MIT Sloane, Harvard and Harvard Business School.

2009-2013

**WASHINGTON UNIVERSITY IN ST. LOUIS**

**SAINT LOUIS, MO**

B.S. Systems Engineering and Applied Science. President of the Linus Children's Foundation. 1<sup>st</sup> place in Olin School of Business Case Competition 2012. Tsinghua University English teacher.

**Experience**

winter 2020

**JDS DEVELOPMENT GROUP**

**NEW YORK, NY**

**Acquisitions, Winter Associate**

Winter intern on development and acquisitions team for 6 weeks. Worked with head of development on underwriting and project management of pipeline deals and new acquisitions.

Selected Deal Experience:

- Built financial model for acquisition of vacant 1.4mm square foot Class A office property in St. Louis, MO for multi-phase repositioning. Assisted in early phase due diligence and term sheet negotiation.
- Underwrote acquisition of a npl on 55-unit garden-style multifamily in Atlanta, GA, with multi-variant lease-up, cap-ex and exit assumptions based on discount, restructuring and maturity.
- Presented incentives, tax and Pace Financing report for 2.5mm square foot mixed-use development in Miami.

2016-2018

**AKERMAN LLP**

**NEW YORK, NY**

**Project Associate, Real Estate Transactions, Land Use and Economic Development Group**

Real estate consultant in areas of tax, economic development and legal diligence. Managed operative agreements, LOIs, JVAs, leases and PSAs in transactions across the capital stack. Represented Savanna, L+M and RXR on economic development strategy. Ran external teams in the analysis and compliance of as-of-right and discretionary abatement benefits. Consulted on RFP responses and rezonings for developments in NYC, Long Island and Yonkers.

Selected Consulting and Management Experience:

- Executed on \$160 mm of tax abatements and business tax credits on a \$2.4 billion NYC office portfolio, which was part of Amazon's HQ2 Long Island City bid.
- Represented lender on due diligence of \$205mm refinance of office property to receive property tax exemption.
- Reinstated noncompliant abatements on a \$200mm medical facility, performing all governmental compliance post-construction, resulting in a 25-year, \$30mm property tax abatement.
- Completed the acquisition and disbursal of \$3.5mm of state infrastructure grants in Yonkers, NY.

2015-2016

**NEWARK ECONOMIC DEVELOPMENT CORPORATION**

**NEWARK, NJ**

**Real Estate Development Officer**

- Prepared investment memoranda and financial models for industrial redevelopment as part of the Port Newark master planning and development study area. Managed and drafted RFP and responses for JV of 5 acres.
- Launched the mayor's economic data collection and research initiative to address up-to-date reporting on real estate market leasing and performance.
- Worked with MWBE vendors to execute over \$400k of governmental contracts on construction, advisory and brokerage, closing the funding gap for minority entrepreneurs and Newark businesses.

**Additional**

Intern under Detroit's Deputy Emergency Manager during municipal bankruptcy.

**Personal**

Amateur chef, middle-school tutor/mentor at FLI Charter School in Harlem, Horace Mann alumni mentor.

**Skills**

Excel (advanced), Argus, Costar, data analysis, python



# NATASHA SADIKIN

nsadikin@mit.edu  
(415) 350 9563

**Versatile, dedicated, and client-focused real estate development professional with 7+ years of experience spanning luxury hospitality, creative office design, tenant improvement build-outs, project management, financial analysis, and data analytics.**

## EDUCATION

**MIT - MASS. INSTITUTE OF TECHNOLOGY**  
2020 M.S. Real Estate Development

2020 Fellow - Sustainable Real Estate Development Action (SREDA)

SA+P Dean's Summer Fund Award:  
*Financial Value of Healthy Buildings*

**UCLA - UNIVERSITY OF CALIFORNIA**  
2013 B.A. Architectural Studies

## LEADERSHIP & INVOLVEMENT

**MIT REAL ESTATE INNOVATION LAB**  
Research analyst and tech editor for a series of webinars with Ernst & Young that focus on the future of automation in real estate. Titles include *A Primer on Smart Buildings and Digital Twins* and *Automation, Healthy Buildings, and the Future of Work*.

**ULI SAN FRANCISCO & LOS ANGELES**  
2015 - 2019 Partnership Forum  
2018 Development 360

## SKILLS

Excel / ARGUS	Bluebeam
R - Data Science	AutoCAD
Adobe Creative Suite	Rhino / Vray

## AWARDS & EXHIBITIONS

**President's Art and Humanities Committee**  
Washington D.C. , October 2010

**De Young Museum**  
San Francisco, CA, May - June 2010

**Carnegie Hall**  
New York, NY, June - August 2009

**International Teen Photo Competition**  
1st Place, May 2012

## PROFESSIONAL EXPERIENCE

**MIT DESIGNX STARTUP ACCELERATOR** January 2020 - Present  
**Entrepreneur In Residence: p(art)ner** Cambridge, MA

- » Selected as one of ten teams to receive \$15,000 in seed funding from DesignX, an incubator accelerator focused on venture building that enhances social impact in the built environment.
- » Fast tracked the development of our idea, p(art)ner, to launch a viable venture in a \$2 billion marketplace by rapidly iterating on vision, strategy, business model, and prototypes of minimum viable products.
- » p(art)ner is a 21st century large-art online gallery that brings together art seekers and art creators to discover, connect, and commission through a single platform.

**AUTOCAMP** February 2018 - August 2019  
**Design and Project Manager** San Francisco, CA

- » Project managed AutoCamp Yosemite, a luxury outdoor hotel comprised of 128 rooms over 35 acres and a \$9.8M construction budget.
- » Created RFPs, negotiated with, and managed consultants to create technical AutoCamp brand standards for efficient nation-wide roll-out strategies. Consultants ranged from architects, interior designers, signage fabricators, furniture designers, to pre-fab contractors.
- » Identified areas for cost savings in the furniture and operating budget by migrating services to new procurement vendor and developing and refining standards for coordination, procurement, warehousing and installation. Savings totaled to 25% of a \$2M furniture and operations budget.
- » Oversaw redesign of luxury tent and ADA travel trailer from prototype stage to final version which was adopted as the go-to-market product standard roll-out.
- » Collaborated with acquisitions team to adapted master proforma as well as explore potential site programming layouts, development cost overview, and preliminary phasing.

**LOESCHER MEACHEM ARCHITECTS** June 2013 - January 2018  
**Architectural Designer** Los Angeles, CA

- » Designed and developed all stages of tenant improvement projects from feasibility studies, programming to construction documentation, permitting, cost analysis, and construction administration for clients with construction costs up to \$33M. Notable clients include Beats by Dre, Media Arts Lab, Nasty Gal, Saatchi & Saatchi, and Team One.
- » Led the coordination of cross-functional engineering teams such as mechanical, electrical, structural, acoustical to derive efficient design and engineering solutions for various buildings and infrastructure projects.
- » Produced all creative assets for both incoming, current projects, and RFPs.

**NATASHA SADIKIN PHOTOGRAPHY** June 2013 - Present  
**Owner** San Francisco, CA

- » Engaged by Hipcamp to provide a variety of outdoor lifestyle photographic services focused on camping sites and outdoor landscapes. Location photography recognized for excellence, and routinely featured on Hipcamp digital media and email marketing campaigns.
- » Lead photographer for Yogique, an emerging skincare line, and created seasonal brand guidelines while leading a creative team of makeup artists, models, and assistants.



# **University of New York and the Schack Institute of Real Estate**

## STEVEN BALTER

New York, NY - (646) 659-2385 - [steven.i.balter@gmail.com](mailto:steven.i.balter@gmail.com)

<https://www.linkedin.com/in/stevenibalter/>

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### REAL ESTATE PROFESSIONAL

Real estate professional with 9+ years of experience in asset management, lease negotiation, finance, loan restructuring and refinancing, accounting, and portfolio management.

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### EXPERIENCE

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**Urban Edge Properties (NYSE: UE, Vornado (NYSE: VNO) Spin Off in 2015), New York, NY** **2017–Present**  
*Real Estate Asset Manager*

- Maintain, develop, and enhance projection models, financial reports, and budgets for 80+ properties
- Prepare detailed financial analyses on potential asset, portfolio, and corporate-level transactions resulting in \$200M+ of acquisitions and \$100M+ of dispositions to align with management's strategic goals
- Perform asset management and portfolio monitoring tasks, including putting together memorandums and model updates for scenarios including retailer bankruptcies and rent collection on 1,400+ tenants.
- Designed process improvements for consolidated debt analysis and reporting, including maintaining related software, compliance with debt covenant requirements, fair value of debt reporting, and prepayment/refinancing analysis/estimates resulting in full compliance with covenants, recovery of \$10M+ of escrows held by lender, and \$550M refinancing transaction
- Review and analyze financial statements (10K, 10Q, and Supplemental Disclosure Package) in accordance with SEC/NAREIT guidelines including supporting the external audit and quarterly review process
- Implementation of processes and technology to comply with new accounting standards resulting in \$100K+ of savings on external consultants.

**PricewaterhouseCoopers LLP, New York, NY** **2013–2017**  
*Asset Management and Capital Markets Advisory Senior Associate*

- Financial statement audits for alternative investment funds including private equity, hedge, and fund of funds including a \$50B+ private equity fund
- Executed a carve out of a fortune 100 listed company while working in the transaction services consulting group

**EisnerAmper LLP, New York, NY** **2011–2013**  
*Financial Services Experienced Associate*

- Financial statement audits and reviews in the financial services, pharmaceuticals, and entertainment industries
- Substantive audit testing including analytical and detail review of account balances and analytical review of financial statements for up to 4 clients simultaneously

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### EDUCATION

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**New York University – Schack Institute of Real Estate, New York, NY** **2019–Present**

- *Master of Science in Real Estate Finance* (Expected Graduation: 05/2021)

**CFA Level III Candidate** – (Expected June 2021 Completion) **Present**

**Certified Public Accountant** – NY State Certified License #112043 **2013**

**Lehigh University, College of Business & Economics, Bethlehem, PA** **2011**

- *Bachelor of Science in Finance and Accounting*

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### TECHNOLOGY AND OTHER INTERESTS

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**Technology:** Microsoft Teams, Skype, Microsoft Office Suite (Excel, Word, PowerPoint), MRI (investment analysis, portfolio analysis, asset modeling, and accounting functions), and Argus

**Other Interests:** Basketball (Started a basketball league in NYC that ran for 5+ years, 2-time NJ state basketball champion), world traveler, coffee enthusiast, vegan cooking, and dog lover.

# Matthew R. Bebbington

82 E 7<sup>th</sup> Street Apt 5, New York, NY 10003 | +1 206.450.7211 | bebbinm@gmail.com

## PROFESSIONAL EXPERIENCE

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### Deutsche Bank (via Hanover Street Capital, LLC)

New York NY

*Portfolio Manager, Assistant Vice President, Commercial Real Estate Group*

October 2017 – Present

- > Asset & portfolio management for Deutsche Bank's Americas & EMEA CRE balance sheet debt portfolio (~\$35bn AUM)
- > Product coverage includes bridge, construction/transitional, special situations/NPLs, term & revolving credit facilities, and mezzanine debt. Typical deals are structured with a \$50 - \$300 million senior secured hold position.
- > Provide portfolio, asset and property level surveillance, re-underwriting of select assets, and measure performance to original underwriting
- > Forecast portfolio returns, monitoring and incorporating updates to business plans, including scenario analysis
- > Produce analytics around balance sheet, capital structure, liquidity, swaps, risk weighted assets, cost of funds, and portfolio burnoff
- > Manage concentration risk in both the portfolio and pipeline within geographies, property types, tenants, loan types, and risk books
- > Conduct hold-sell analyses and price/yield calculations for CMBS/CLO issuance, and individual note/portfolio sales
- > Produce extension and refinance analyses including performing debt yield, DSCR, and LTV tests
- > Assist bank deal teams in syndication strategies to decrease individual asset exposure and meet target holds
- > Partner with Asset Managers on restructurings, especially during ongoing COVID-19 crisis
- > Develop content and themes for periodic sectoral deep dives
- > Oversee key initiative to develop an asset management system and portfolio analytics dashboard, including advising and monitoring management consultants on project scope, requirements, design, and implementation
- > Participate in periodic site visits
- > Deliver regulatory reporting to the FRBNY and ECB
- > Manage two junior members of the team

### JPMorgan Chase & Co.

New York, NY

*Associate, Portfolio Management, Commercial Real Estate*

March 2012 – October 2017

- > Provided portfolio management support to a core U.S. CRE debt portfolio (~\$50bn, 40% growth during tenure)
- > Developed credit analytics, portfolio returns and metrics, and profitability segmentation
- > Received formal credit training, supported loan underwriting process and development of procedures
- > Prepared well-received presentations for line of business CEO's annual sales force addresses
- > Nominated to *Analyst & Associate Advisory Council* and *Officer, JPMorgan Pride Network*
- > Participated as a speaker, firm representative, and interviewer for *Proud to Be* and *Out for Undergrad* events, which target LGBTQ+ students

### Prometheus Energy

Redmond, WA

*Business Development Intern*

September 2011 – December 2011

- > Built CRM database and developed a performance dashboard to drive future sales growth at a startup liquid natural gas (LNG) producer

### Deloitte Consulting

Seattle, WA

*Research Analyst Intern*

January 2011 – June 2011

- > Measured volume, sentiment, trending, and other patterns within market data, reporting recommendations to clients

### Amazon.com

Seattle, WA

*Intern, International Finance*

June 2010 – December 2010

- > Projected revenue buckets (~\$8Bn), consolidating inputs from 6 international teams

## EDUCATION

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### New York University

New York, NY

*Master of Science in Real Estate—Finance and Investment*

May 2021 (expected)

- > Relevant Coursework: RE Capital Markets, Distressed Debt, Asset Management, Valuation & Feasibility, Development, Corporate Finance, Taxation & Accounting, RE Economics & Market Analysis, Negotiation & Dispute Resolution, and Finance & Investment Analysis

### Seattle University, Albers School of Business & Economics

Seattle, WA

*Bachelor of Arts in Economics, magna cum laude*

December 2011

- > **Cumulative GPA: 3.8/4.0**

- > Honors/Activities: Albers Alumni Scholarship, Alpha Sigma Nu, Omicron Delta Epsilon, Economics & Statistics Peer Tutor

## ADDITIONAL

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**Software:** ARGUS Certified, Bloomberg Market Concepts Certified, Trepp Certified, Macabacus, Capital IQ, Tableau, MS CRM, VBA

**Skills:** underwriting, valuation, asset management, financial analysis, property budgeting, market research, surveillance & reporting

# Alex Beygelman

419 East 57<sup>th</sup> Street, Apt 15F | New York, NY 10022 | 516.724.4286 | alex.beygelman@gmail.com

## PROFESSIONAL EXPERIENCE

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### **Varagon Capital Partners, New York, NY**

**June 2017 - Present**

*Vice President – Corporate Development and Product Strategy*

#### Select Transaction Experience:

- **Project Valor – sale of minority stake to Aflac including a multi-year \$3.0BN strategic LP commitment**
  - Worked directly with senior management and key stakeholders in the evaluation of strategic alternatives to determine optimal path for Varagon's near-term and long-term objectives
  - Drove the creation of key marketing materials, including, but not limited to, platform valuation, long-term financial projections/model and confidential information memorandum
  - Key liaison between external counsel, financial advisors and senior management team in the negotiation, structuring and execution of key transaction GP and LP agreements
- **Expansion of Senior Direct Lending Program JV with Ares (SDLP), raising \$2.5BN of new commitments**
  - Key member of the team in the restructuring of the SDLP JV, including negotiation of terms among senior note and equity investors, liaising with rating agencies and external counsel, and documentation of transaction documents
  - Worked with external consultant to develop proprietary rating technology model, which lead to the successful optimization of the program and maintenance of senior note credit rating
  - Lead the development of third-party monthly and quarterly investor reporting package
- **Development and rollout of flagship private-to-public BDC (Varagon Capital Corporation)**
  - Developed strategy to raise a long-term scaled funding vehicle by converting existing \$154M commingled fund into a \$500M+ private-to-public BDC
  - Analyzed, structured, and negotiated advisor profit interest arrangement with key anchor investors
  - Lead creation of key investor marketing materials, such as fund projection model, Varagon's firm wide track record, PPM, fund presentation and due diligence questionnaires

### **Barclays, Investment Banking, New York, NY**

**June 2015 – June 2017**

*Associate – Financial Institutions (Asset Management, Specialty Finance, and Financial Technology)*

#### Select Transaction Experience:

- Project Mead – advisor on potential sale of ~\$600mm minority stake portfolio of alternative asset managers
- TPG Specialty Lending – Joint Bookrunner on ~\$80mm follow-on offering of common stock

### **Sandler O'Neill + Partners, Investment Banking, New York, NY**

**June 2014 – June 2015**

*Associate – Financial Institutions (Specialty Finance)*

#### Select Transaction Experience:

- Sunlight Financial LLC – introducing broker and financial advisor on \$300mm in funding commitments
- Project Mercury – advisor to Merchant Cash Advance Company on dual track sale and primary capital raise

### **BMO Capital Markets, Investment Banking, New York, NY**

**June 2011 – June 2014**

*Analyst – Financial Institutions (Generalist)*

#### Select Transaction Experience:

- Ascensus/Upromise – sole financial advisor to Ascensus on \$122 million acquisition of Upromise and Joint Bookrunner, Joint Lead Arranger, and Administrative Agent on \$307 million re-financing
- Air Lease Corporation (NYSE: AL) – Joint Bookrunner on \$450mm and \$400mm high-yield offering

## EDUCATION

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### **New York University, Schack Institute of Real Estate**

**Expected 2022**

*Master of Science, Real Estate Development (part-time)*

### **Baruch College/CUNY, New York, NY**

**January 2011**

*Bachelors of Business Administration, Finance & Investments*

**GPA:** 3.73/4.00

**Honors:** Cum Laude; Golden Key Honor Society; Beta Gamma Sigma International Honor Society

**Skills & Certifications:** A.CRE Real Estate Financial Modeling Accelerator, Argus, Series 79 & 63 (previously registered)

# KAYLA M. DANIEL

Kd1379@nyu.edu

160 West 24<sup>th</sup> St., Apt. 8F, New York, NY 10011  
(440) 554-1755

## Education and Honors

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**New York University Schack Institute of Real Estate**, New York, NY Aug. 2020- Present  
Masters of Science in Real Estate Candidate; Finance and Investment  
**Hirsch Fellowship Recipient (4.0./4.0)**

**University of Miami**, Coral Gables, FL Aug. 2012 – May. 2016  
**International Finance and Marketing** (Major), **Psychology** (Minor)  
Magna Cum Laude (**3.88 Cumulative GPA**)

## Work Experience

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**Global Wealth Partners Inc.**, San Diego, CA July. 2017 – Present  
**Financial Advisor & Vice President of Client Relations** (Full-time)

- Member of a team of Financial Advisors advising on more than \$1 billion in assets
- Led entire client managed account transition of over \$100 million to new brokerage firm
- Assess real estate investments focusing on Capitalization Rate, Net Operating Income and cash flow
- Analyze tax strategies, financial plans, annuity, insurance products and private placement investments (senior housing, hotel, warehouses, and other commercial properties)
- Perform rental and sale analyses on clients' residential properties
- Execute trades, perform client onboarding, monitor transactions and client inquiries
- Conduct client reviews discussing financial performance, goals, products and account details and maintenance
- Coordinate multiple client appreciation events across the nation while cultivating relationships with prospects
- Created client tracking and management systems

**J.P. Morgan Securities**, Atlanta, GA Feb. 2017 – June. 2017  
**Marketing Associate** (Full-time)

- Member of a team of Financial Advisors managing more than \$1 billion in assets
- Spearheaded the team's mortgage division creating leads and assisting clients through the mortgage process
- Directed client expansion strategies through cold calling and researching CEOs of multinational corporations
- Marketed J.P. Morgan's products and services

**1Huddle: The Workforce Platform**, Miami, FL May. 2015. – May. 2016  
**Account Executive** (Internship)

- Developed sales leads working with over 80 clients
- Assisted in product development for web-based game "The Training Game"
- Performed in-depth research on workforce development and audited financial statements
- Implemented marketing and social media campaigns

**The University of Miami Athletic Department**, Miami, FL Jan. 2015- May. 2016  
Student-Athlete Mentor

## Professional Licenses

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**Series 7** General Securities Representative Exam Apr. 2017  
**Series 66** Uniform Combined State Law Exam June. 2017  
**Life and Health Insurance License** Aug. 2017

## Volunteer Experience

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**Huruma Rescue Mission**, Embu, Kenya May. 2008 – Present  
**Youth Director**

- Participating in opening an elementary school
- Placing children orphaned by AIDS into select boarding schools throughout Kenya
- Involved in collecting over 100,000 books to create a library in Embu, Kenya

**National Society of Collegiate Scholars (NSCS)**, Coral Gables, FL Aug. 2015 – May. 2016  
**President**

- Liaison between 200 members, national office, e-board and advisor

- Oversaw all financial transactions and event planning

**Big Brothers Big Sisters**, Coral Gables, FL

Aug. 2012. – May. 2016

**Big Sister-** Mentored elementary student one hour per week

**Planning to Achieve Collegiate Excellence (PACE)**, Coral Gables, FL

Aug. 2013 – May. 2015

**Vice President-** Tutored at risk high school students two hours per week

**Inspire U**, Coral Gables, FL

Aug. 2014 – May. 2016

**Leadership Board-** Designed college preparatory workshops for high school students

## **Skills and Personal Experience**

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- Intermediate proficiency in Spanish
- Traveled to 36 different countries
- Expert skills in PowerPoint, Excel and financial aggregate/reporting tools such as Morningstar and Orion Advisor

# RAFAEL A. GAMBA

223 11<sup>th</sup> Street, Brooklyn, NY 11215 | (347) 967-6165 | rafaelgamba@me.com

## EDUCATION

### SCHACK INSTITUTE OF REAL ESTATE, NEW YORK UNIVERSITY

New York, NY

*Master of Science Candidate; Majors in Real Estate Finance and Investments*

2020 – 2021

- Hirsh Fellowship Recipient
- Relevant Coursework: Real Estate Finance, Real Estate Market Analysis, Corporate Finance

### CONNECTICUT COLLEGE

New London, CT

*Bachelor of Science; Majors in Economics, Architectural Studies*

2013 – 2017

- Deans High Honors, NESCAC All-Academic Athlete

### IES LIBERAL ARTS AND BUSINESS

Barcelona, Spain

### LONDON SCHOOL OF ECONOMICS

London, England

## WORK EXPERIENCE

### FIRST STANDARD CONSTRUCTION

New York, NY

#### Project Manager

2017 – 2020

- Manage day to day operational aspects of residential property development from pre-construction through completion
- Handle multiple projects at a time using a philosophy of open communication, preparation/ planning, and accountability
- Develop scopes of work, level subcontractor bids, and negotiate contracts to effectively maintain project budgets
- Lead owner meetings, coordinate site walkthroughs, and circulate weekly agendas
- Coordinate closely with architects, owners and construction teams ensuring expectations are clear and goals are met
- Generate and maintain critical project data including: budgets, schedules, submittals, RFI's, and change orders
- Oversee on-site staff and collaborate with accounting, design and management teams
- Create value engineering packages in collaboration with owners reps., architects, and engineers
- Work on-site ensuring quality workmanship, timely delivery, and safe working practices adherent to OSHA standards

### SYNERGY STAR REALTY

Brooklyn, NY

#### Assistant Construction Manager, Associate Property Manager

2013 – 2017

- Assist in oversight of multifamily residential development projects ranging in size and scope from 3,500 to 30,000sf
- Coordinate, manage costs, and execute Capex and TI projects — including design, permitting and construction
- Manage active assets with a hands-on approach creating value through efficient redevelopment and rehabilitation
- Balance a \$20 M real estate portfolio by mitigating risk and selecting properties in niche areas with most attractive Cap Rates and healthier real estate market analytics
- Acquire income producing properties via public auctions, bank's owned notes, private deals, and short sales
- Inspect property conditions, both structural and cosmetic to determine extent of required renovations or repairs

### NEW YORK STOCK EXCHANGE

New York, NY

#### Floor Operations Summer Intern

2011 – 2013

- Recognize, analyze, and troubleshoot issues at the Post level – opening delays, trading activity, and system errors

## SERVICE AND LEADERSHIP

### URBAN LAND INSTITUTE

New York, NY

#### Young Leaders Group— Co-Chair, Professional Development Committee

2018 – Present

- Launch the Professional Development Committee helping ULI Members under 35 develop relevant professional skills  
Programs include: Peer to Peer Mentorship, Argus Enterprise training, introductory WELL AP courses

### AMOR, FE Y ACCIÓN

Tegucigalpa, Honduras

#### Co-founder, Nonprofit Social Welfare Organization

2012 – Present

- Collaborate with local leaders to develop multi-use community centers that support grassroots initiatives, schooling, and recreational youth programs

## ADDITIONAL INFORMATION

**Relevant Skills:** Fluent in Spanish, Microsoft Office Suite, AutoCAD

**Certifications:** ARGUS Enterprise, ULI Pro Forma Fundamentals, ProCore Project Management

**Interests:** Squash, Cycling, Art & Design, Scuba Diving



# JACK KIDD

404.693.5484 | New York, NY | [ja.kidd@outlook.com](mailto:ja.kidd@outlook.com)

## Education

<b>New York University - Schack Institute of Real Estate</b> <i>Master of Science, Real Estate Finance and Investment - GPA 4.0</i> ○ Honors: The Hirsh Fellowship ○ Awarded to a select 10-student cohort per year. Curriculum spans the many facets of the real estate industry with an emphasis on analytics, financial modeling and leadership	New York, NY Sept 2021
<b>Trinity College</b> <i>Bachelor of Arts, Economics</i> ○ Teacher Assistant- Econ. 319: The Modern Macro Economy	Hartford, CT May 2015 Jan 2015- May 2015

## Relevant Experience

<b>Cushman &amp; Wakefield</b> <i>Associate</i> ○ Conducted market research, demographic studies, rental rate analysis and general due diligence ○ Created dynamic discounted cash flow models using Excel for all major commercial product types ○ Developed an in-depth understanding of NPV, RFPs, NER, Letters of Intent, Purchase and Sale Agreements, lease terms, FAR, zoning restrictions, surveys, partnership structures and debt capital ○ Negotiated the terms of over 30 Purchase and Sale agreements ○ Built relationships with property owners, zoning officials, neighborhood associations, and CID members ○ Solely managed up to 10 listings at a given time; all at different stages of the sales cycle ○ Transacted over \$190,000,000. Select transactions: ○ \$37,000,000 sale price -- 3.1 Acres in Midtown, Atlanta ○ Land for Norfolk Southern's new global headquarters ○ Included in State of Georgia's pitch for Amazon's HQ2 ○ \$36,000,000 sale price -- 7.6 acres in West Midtown, Atlanta ○ \$20,000,000 sale price -- 2.6 Acres in Buckhead, Atlanta ○ \$16,600,000 sale price -- 1 Acre in Midtown, Atlanta	Atlanta, GA Oct 2017 – July 2020
<b>J.P. Morgan Securities</b> <i>Associate</i> ○ Underwrote and executed over \$100,000,000 of traditional home mortgage loan applications ○ Responsible for roughly \$7,500,000 of new assets under management ○ Customized asset allocation plans for 40+ individuals and families based on their personal requirements ○ Earned Series 7 and Series 66 licenses	Atlanta, GA Jun 2015 – Oct 2017
<b>Cornerstone Real Estate Advisors</b> <i>Finance Student Representative</i> ○ Gained proficiency with ARGUS researching industrial properties in targeted east-coast port cities that would benefit from the Panama Canal expansion plans ○ Prepared and delivered multiple investment memos to the 6-person investment committee	Hartford, CT Aug 2014 – Dec 2014
<b>Merrill Lynch</b> <i>Summer Brokerage Program</i> ○ Analyzed relative value of various asset classes based on historic price relationships to forecast future value ○ Collaborated with a team of financial advisors to identify optimal money managers for the group's clients	New York, NY May 2014 - Aug 2014
<b>Jones Lang LaSalle, Inc.</b> <i>Agency Leasing Intern</i> ○ Analyzed rental rate trends in the Hartford office market to identify potential new office landlord clients ○ Responsible for tracking and maintaining a database for tenant's lease expirations in current portfolio	Hartford, CT Jan 2014 - May 2014

## Excel and ARGUS Training

<b>A.CRE Financial Modeling Accelerator</b> ○ Accelerator Graduate- 2020 <b>REFM Certification in Excel for Real Estate</b> ○ Level 1 and 2- with Destination- 2020 <b>ARGUS Enterprise</b> ○ Certified- 2020	<b>New York University</b> ○ ARGUS Fundamentals- 2020 ○ Real Estate Financial Modeling Using Excel- 2020 ○ Real Estate Financial Analysis- 2020 ○ Beginner, Intermediate, Advanced Financial Modeling Workshops- 2020
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## GIL LIPKIN

280 Park Avenue South New York, NY 10010 | 305-904-6995 | gl1401@nyu.edu

### EDUCATION

#### NEW YORK UNIVERSITY SCHACK INSTITUTE OF REAL ESTATE

New York, NY

##### *Master of Science in Real Estate Candidate; Finance & Investment*

August 2020-Present

- GPA 4.0/4.0, Hirsh Fellowship Recipient
- Relevant Coursework: Real Estate Finance, Corporate Finance, Real Estate Market Analysis

#### NEW YORK UNIVERSITY STERN SCHOOL OF BUSINESS

New York, NY

##### *Bachelor of Science in Business Administration; Majors in Finance and Management*

2015- 2019

- Academic Honors: *magna cum laude*, GPA 3.8/4.0, Dean's List (all semesters)
- Awards: University Honors Scholar, NYU President's Service Award
- Extracurriculars: Stern Real Estate Group, NYU Ice Hockey Team, Stern Finance Society

### EXPERIENCE

#### MIZUHO SECURITIES

New York, NY

##### **Investment Banking Analyst**

2019-2020

- Drove valuation for both active and prospective engagements using discounted cash flow (DCF), leveraged buyout (LBO), and comparable companies analyses
- Created operating models detailing leverage and debt repayment under various financing structures available to the client
- Ranked in the top 15% of analyst class across all coverage and product groups

##### *Selected Transaction Experience:*

- Exclusive sell-side advisor to a high-growth robotic process automation company valued in the ~\$100mm-\$300mm range
  - Worked extensively with CFO and VP of Finance to build a comprehensive three statement operating model with detailed revenue and cost drivers, factoring in the company's planned international expansion and headcount build
  - Created marketing materials including the teaser distributed to over 100 potential investors and the Confidential Information Memorandum (CIM)
  - Screened hundreds of financial sponsors and strategics based on investment focus, dry powder, and geographic orientation to target viable candidates, several of whom were ultimately included in the process
- Joint lead arranger and joint bookrunner for Xerox's proposed acquisition of HP for \$33bn (Terminated)
  - Built operating and accretion/dilution model with several scenarios to analyze leverage and debt-repayment under different operating scenarios post-acquisition
  - Prepared a deck outlining different financing situations to best accommodate the client's objectives in consideration of strategic objectives and rating agency views
- Buy-side advisor to a leading communication technology company in bid to acquire a foreign competitor
  - Drafted the indication of interest (IOI) submitted to the target company and built valuation materials used to establish valuation range included in the bid

#### MIZUHO BANK

New York, NY

##### **Investment Banking Summer Analyst**

Summer 2018

- Summer analyst for a 10-week internship; received full-time return offer
- Prepared marketing materials for live financial sponsors deal involving a top private equity firm and teleproduction company

### ADDITIONAL INFORMATION

- **Skills:** Microsoft T-SQL, ARGUS, Fluent in Hebrew
- **Interests:** Ice Hockey, Photography, Skiing, Backgammon, HBO Originals, Formula Racing
- **Certifications:** Series 63, Series 79, Series SIE

## Personal Information

**British and Italian Dual  
Citizenship**

**Term Address**

60 West 57<sup>th</sup> St. Apt. 7N  
New York, NY 10019

**Mobile**

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**LinkedIn Profile**

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## Education

**September 2019 - 2021 | NYU, Schack Institute of Real Estate**

MS – Real Estate (Finance and Investments concentration)

- Current Cumulative GPA – 3.9/4.0
- Chair of Finance Investment Group (Student Organization)

**August 2019 | London School of Economics**

FM250 – Finance Course, Grade: A

**September 2015 - 2019 | University of Bath**

BEng (Hons) – Civil Engineering

- Graduated with upper second class honours degree (2:1)
- Stand out mark in Mathematics module achieved (84%)

**2008 - 2015 | St George's British International School, Rome**

- 2015 - International Baccalaureate (38/45)
- 2013 – International GCSEs (4 A\*, 6 A)

## Professional Experience

**Titanium Realty Group**

January - June 2021 | Real Estate Acquisitions Analyst

- Secured internship in New York Development firm for my final semester at NYU Schack.

**BuroHappold Engineering**

October - April 2019 | Research Consulting Project

- Wrote thesis aimed at maximising commercial real estate value for a firm's multinational client.
- Used Python for big data analytics as well as BuroHappold's in-house developed software, SmartMove to run numerous people flow simulations.
- Awarded first class grade (1:1)

**RC Costruzioni – Renovando Construire S.p.A.**

July - August 2018 | Summer Intern

- RC is a boutique general contractor operating mainly in the Luxury Hotels and Retail sectors. Major clients include: Marriott Hotels, Virgin Media, LVMH, Richemont and McKinsey & Company.
- Performed rotational activities and shadowing around numerous company departments with the aim of better understanding the business functionality of a SME.

**Deloitte Touche Tohmatsu Int.**

June - August 2017 | Audit & Assurance Summer Intern

- Completed national training course for new employees and joined audit teams for various major company clients in the role of assistant analyst.
- Daily tasks of gathering and updating data from banks and companies' balance sheets, ensuring that all data coincided with the client's accounts.

**Società Italiana per Condotte D'Acqua S.p.A.**

June - July 2016 | Engineering and Geotechnics Intern

- Thoroughly studied Norman Foster's project for new high-speed rail station in Florence.
- Tracked and monitored functional geotechnical instruments installed on the active site and produced a 20-Page report of my work experience and research.

## Skills and Interests

Languages: English (Native), Italian (Native), Spanish (Fluent), French (Basic)

Programming Languages: Python (use in dissertation and individual university coursework), MATLAB (use in individual university coursework)

Software Proficiencies: Microsoft Office Suite, Argus Enterprise, AutoCAD, Rhinoceros 3D, SketchUp

Sporting Involvements: 7-year experience in water polo, former member of Bath University's first team winning promotion to BUCS (British University College Sports) premier league.

Recreational Sport: Football, Golf, Skiing, Sailing, Tennis

# Steven Lusby

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Born and raised in Severna Park, MD. A real estate professional with significant experience in real estate investment financial modeling, deal sourcing and originating, development/construction, due diligence, contract/lease negotiations, and project design, estimating/scheduling. Recognized as an extremely hard working and entrepreneurial individual that thrives in a team atmosphere.

## EXPERIENCE

### HOLLISWOOD DEVELOPMENT

New York, NY

#### *Acquisitions Director*

April 2020 - Current

- Head of acquisitions group for boutique real estate investment firm focused on value-add/ground up multifamily, mixed-use and ground-up development in Manhattan
- Responsible for all aspects of new acquisitions; sourcing, negotiating contracts, structuring debt & equity, due-diligence, project design
- Created investment thesis to opportunistically acquire value-add multifamily and mixed-use assets in Manhattan
- Led groups capital raising efforts to secure programmatic equity JV partnerships

### CONSULTANT

NY, CA, ME, FL

#### *Acquisitions/Asset Management*

June 2019 – April 2020

- Assisted with ad-hoc acquisitions, asset management, and capital raising efforts with Host Property Group, Davean Holdings, Lightning Capital, and Northstar Centers
- Sourced, underwrote, and led due diligence for value-add acquisitions focused in NY (~12m total capitalization across 2 transactions)
- Financial modelling analysis of JV structures for multifamily, mixed-use, and retail acquisitions and recapitalizations
- Served as a property manager & construction project manager for multifamily and retail assets in NY, CA, ME, FL

### PENN SOUTH CAPITAL

New York, NY

#### *Acquisitions Associate*

June 2018 – June 2019

- Sourced, underwrote, led due diligence, and structured short term acquisition loans for three new multifamily and mixed-use acquisitions in the East Village neighborhood in Manhattan (~20m total capitalization across 3 transactions)
- Managed portfolio of multifamily and mixed-use assets in Manhattan
- Structured and led refinancing's of multifamily and mixed-use assets once projects were stabilized
- Responsible for creating quarterly investor updates and models/investment memos for new acquisitions

### MARCUS & MILLICHAP

New York, NY

#### *Investment Sales Broker*

July 2014 – June 2018

- Senior partner of the Dansker Group focusing on mid-market investment sales of multifamily, mixed-use, retail, office, and development sites in New York City
- Managed a group of four junior brokers and served as the team's lead analyst
- Responsible for more than 250m in sales volume across more 30 transactions

## EDUCATION

### SCHACK INSTITUTE OF REAL ESTATE, NEW YORK UNIVERSITY

New York, NY

#### *Master of Real Estate Finance – Hirsh Fellow*

Current

### RUTGERS UNIVERSITY

New Brunswick, NJ

#### *Bachelor of Science in HR Management & Labor Studies - Member of Men's Lacrosse Team*

2010-2014

## SKILLS AND INTERESTS

- **Skills:** Financial modelling, Microsoft suite, Experience with Argus, NY Rent Regulation, Presenting and articulating clear investment strategies, Deal sourcing & structuring
- **Interests:** Sports, Hiking, Travelling

**Julie N. McLymont**

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Brooklyn, NY 11234

646-353-7853 [jnmclymont@gmail.com](mailto:jnmclymont@gmail.com)

**EDUCATION**

*New York University SPS, Schack Institute of Real Estate, New York, NY*

Master of Science, 8/2021-Projected

Concentration: Strategic Real Estate Management & Urban Planning and Urban Systems

*The City College of New York,*

*New York, NY*

Bachelor of Arts, 6/2007

Dual Majors: Africana Studies/Psychology

**Licenses and Certifications**

*Licensed New York Real Estate Salesperson, The Department of State, Albany, NY 2007*

*Certified Residential Property Manager, The City of New York Department of Housing and Preservation Development New York, NY 2006*

**WORK EXPERIENCE**

*Private Consultant, JD Walsh Equity Standard Real Estate, New York, NY 10/2017-*

- Strategic Real Estate Management
- Mixed-Use Affordable Housing Development (100 + units or around -100,000 s.f. buildable with ground floor retail/community space)

*Strategic Real Estate Management Apprentice, Myers Smith & Granady Inc., New York, NY 4/2011-11/2012*

- Evaluated tenant leases, updated records, and verified expected rent for each property with accountants rent journal
- Analyzed with accountant scheduled rents, real estate taxes, operating expenses, and reserves
- Assessed each property for external and internal cosmetic issues, and repairs
- Oversaw property manager and superintendent's day to day operations
- Introduced myself to tenants, made note of any issues with unit, communicated with asset manager of potential solutions, and provided correspondence to tenants
- Created and reported monthly statements with accountant on properties' performance of net income

*Licensed Commercial Leasing Agent, Exit Realty Landmark, New York, NY 11/09-05/10*

- Created listings of commercial space
- Selected and pre qualified prospects
- Negotiated the purchase of turnkey businesses and established a lease
- Negotiated lease type, monthly rent, and escalation allowance

*Independent Consultant, Davidson Wellness Engagement (DWE), New York, NY 04/08-10/09*

- Managed operations of privately owned health and wellness practitioner by interpreting all patient medical records and invoices

*Asset Manager, Davidson Wellness Engagement (DWE), New York, NY 04/08-10/09*

- Performed bookkeeping of inventory, revenue, expenses, and cost analysis

*Licensed Real Estate Salesperson, Homeland Realty, Queens, NY 03/07-09/08*

- Gathered prospects and pre-qualified
- Showed residential and rental properties
- Performed listing agreements, sales agreements and commission agreements, dual agency, residential property data sections, and distributed lead paint pamphlets

**RELEVANT SKILLS:** Strong problem solver, goal oriented, team player, effective and concrete negotiator, constructive operation and management skills

**COMPUTER SKILLS:** Microsoft Word, Microsoft Excel, and Argus

# MATTHEW PICARD

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## EDUCATION

### New York University, Schack Institute of Real Estate

New York, NY

*Master of Science in Real Estate, Concentration: Finance and Investment, GPA: 4.0*

Expected August 2021

- **Relevant Coursework:** Real Estate Finance, Real Estate Economics and Market Analysis, Accounting and Taxation, Legal Principles and Practice, Corporate Finance, RE Financial Modeling

### Cornell University, College of Human Ecology

Ithaca, NY

*Bachelor of Science in Policy Analysis and Management, GPA: 3.6/4.0*

May 2019

- **Relevant Coursework:** Multiple Regression Analysis, Statistics, Strategic Management, Economics, Urban Studies

### Choate Rosemary Hall

Wallingford, CT

*Dean's List, GPA: 3.8/4.0*

June 2015

## EXPERIENCE

### Gartner, Inc.

Stamford, CT

*Business Associate – Rotational Development Program*

2019 – 2020

- Chosen as one of twenty members to join the Rotational Development Program at the world's largest research and advisory company; serving IT, supply chain, finance, sales, and marketing leaders at over 15,000 global corporations
- Assisted in the creation of operating model for company comprised of 5,000+ person salesforce seeking to maintain double-digit YoY sales growth and reach \$4Bn in annual revenue
- Engaged with Gartner's Technical Professional clients on key challenges related to IT strategy, digital transformation, cloud migration, and technology cost optimization

### Atlas Construction Services LLC

Branford, CT

*Real Estate Development Analyst*

2016 – 2019

- Aided in budget modeling, financial underwriting, and architectural design process for development projects ranging from \$3 to \$30 million
- Researched potential investments using comparable rents and development cost models, as well as analyzing previous commercial transactions, and creating property cash flow models for multifamily and mixed-use projects
- Engaged with various lenders, brokers, and modeled returns for prospective equity investors

### Bloomberg L.P

San Francisco, CA

*Financial Analytics & Bloomberg for Commercial Real Estate*

June – August 2018

- Initiated sales campaign by highlighting functionality to source deals, view tenant credit ratings, and analyze market trends from third-party data source
- Utilized private equity fundraising tool to connect Limited and General Partners and for clients to view LP commitments to various real estate funds and benchmark performance using Bloomberg's IRR data rankings
- Accessed historical and forecasted rent, cap rate trends and vacancy data, financing rates, and other economic data from Real Capital Analytics to illustrate use-case for Real Estate firms in San Francisco, Los Angeles, and Oakland

### UBS Financial Services Inc.

Weehawken, NJ

*Sales & Trading Summer Analyst*

June – August 2017

- Performed market and quantitative research analysis, tracked market trends and portfolio performance, created client-facing reports based on data analysis, and conducted strategy-focused stock pitch presentations
- Provided analytical support and assisted in the execution of \$50 million in equity transactions
- Employed various financial risk models and produced client-specific portfolios based on risk allocation

## LEADERSHIP & INVOLVEMENT

### Phi Beta Lamda- Future Business Leaders of America

Ithaca, NY

*Cornell University Chapter*

2017 – 2019

### Delta Upsilon Fraternity

Ithaca, NY

*Cornell University Chapter – Finance Committee*

2017 – 2019

## SKILLS & INTERESTS

Skills: Bloomberg | FactSet | Microsoft Excel | Powerpoint | Microsoft Power BI | Visio | Stata | RStudio | Argus

Interests: Skeet Shooting | Squash | Watersports | Urban Renewal | Logistics | Scuba Diving | Skiing | Biohacking

# MARY HELEN M. TARBUTTON

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## EDUCATION

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<b>NYU Schack Institute of Real Estate</b>	MS in Real Estate Finance and Investment	*Can start full-time immediately
<b>The University of Georgia at Athens, GA</b> <b>Terry College of Business</b>	Bachelor of Business Administration, Finance Minor in Spanish <i>Overall GPA: 3.82/4.00</i>	May 2019
<b>Episcopal High School at Alexandria, VA</b>	College Preparatory Diploma	May 2015

## EXPERIENCE

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**Mission Capital Advisors** – New York, NY November 2019 – Present  
*Debt and Equity Finance*

- Prepare financial models and debt sizing analyses to underwrite investments across all property types and geographies.
- Create marketing materials based on thorough market research using tools like CoStar and Real Capital Analytics.
- Pitch deals to lenders and generate a matrix of offers to send to the client.

**CBRE** – Atlanta, GA Summer 2019  
*National Sales Internship Program*

- Conducted company, property, and industry-specific research.
- Provided ongoing support with current deals, including market surveys, proposal and lease reviews, and financial analysis.
- Tracked local and regional activity, e.g., economy, major firm activity, industry trends and demographics that affect the local market.
- Assisted in developing and preparing marketing and presentation materials.
- Worked collaboratively with my team to win the program's case study presentation, awarded by top management.

**Veronica Beard** – New York, NY Summer 2018  
*Sales Intern*

- Created sales projections based on budget and competitive pricing models for products.

**University of Georgia, Office of Government Relations** – Athens, GA April - December 2017  
*Student Worker*

- Informed federal, state, and local officials of ongoing research at UGA and the impact of policies on the University.

## CERTIFICATIONS AND SKILLS

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Adventis Financial Modeling Certification Program: Financial Modeling Course, Valuation and LBO Modules August 2018

**ARGUS Software Certified** November 2019

Proficient in R/ R Studio, Salesforce, CoStar, RCA, ESRI/ ArcGIS, CompStak, and Microsoft Office

## LEADERSHIP

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**NYU Real Estate Institute Student Association**  
*Social Committee Chair* Fall 2020 – Spring 2021

- Selected 1 of 11 committee chairs to plan networking and philanthropic events on behalf of the Schack community.

**Terry College of Business Ambassador** Fall 2018 – Spring 2019

- Selected 1 of 44 business students from over 400+ applicants to represent the school to donors and people of influence.

**Kappa Kappa Gamma Sorority** Fall 2015 – Spring 2019  
*Member and Rush Chair*

- Spearheaded recruitment of a pledge class of 80 women while balancing multiple priorities under significant time pressure.
- Coordinated all aspects of the two weeks of fall recruitment including management of a \$30,000 budget.

## EDUCATION ABROAD

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- Semester at Sea Voyage circumnavigating the globe – *Colorado State University* Spring Semester 2018
  - Japan, China, Hong Kong, Vietnam, Myanmar, India, Mauritius, South Africa, Ghana, Morocco, Germany

# TAIS TSVILYNIUK

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## EDUCATION

### New York University

New York, NY

#### MS in Real Estate Finance, 4.0 GPA

part time student

Relevant Coursework: Real Estate Financial Modeling, Real Estate Investment Analysis, Real Estate Development, RE Financial Analysis, Fundamentals of Construction Drawings, Construction Project Scheduling, Residential Property Management, Zoning and Development Planning, Real Estate Development Market Analysis and Feasibility

### New York University

New York, NY

#### BA in Economics, 3.5 GPA

Graduated May/2018

Business Studies Minor, Stern School of Business

## LICENSES AND CERTIFICATIONS

- REFAI Real Estate Finance and Investment Certification
- California Real Estate Salesperson license
- Advanced Excel, CompStak, ArcGis, Microsoft Suite, MS Project

## PROJECT EXPERIENCE

### Residential Real Estate pro forma

- Underwriting of residential development with levered and unlevered analysis, hard and soft cost estimates, promote structure
- Due diligence, zoning analysis, acquisition process Commercial Forecasting of cash flows
- Market leasing assumptions, expense growth forecasting

Market Analysis - Metro summary and outlook for Houston, TX

## PROFESSIONAL EXPERIENCE

### Titanium Realty Group

New York, NY

Intern

September-October 2020

Worked on acquisition – reviewed tax maps and property history of ownership, zoning and opportunity zones, underwrote new development and adjusted market conditions to fit current economic situation, feasibility analysis, market research, build sensitivity tables for possible market scenarios,

### Eastern Union

New York, NY

Underwriting Intern

June 2020- August 2020

- Multifamily purchase and refi proforma underwriting with loan terms and constraints

### NAI Capital

Los Angeles, CA

Intern

August -November 2019

- Worked alongside brokers to market properties
- Assisted in sales and lead generation by cold calling 30-40 property owners daily and generating 5-10 new leads daily

### New York City Council

New York, NY

Real Estate Policy Division Intern

September 2014-January 2015

- Assessed a tax-exempt financing to multifamily rental developments in which 20% of units are set aside for low income residents in exchange for 4% tax exempt financing, analysed budget estimates for upcoming projects
- Presented to management an evaluation of participatory budgeting projects with their cost analysis and funding proposals
- Provided division members with daily coverage of Council hearings relevant to their projects





# **University of North Carolina and Kenan-Flagler Business School**

# ANTOINE K. ADOU

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## EDUCATION

**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** — Chapel Hill, NC May 2022

**Master of Business Administration, Full-Time MBA Program**

- Concentration in Real Estate; Enrichment in Entrepreneurship
- Finalist; UNC Kenan-Flagler 1Y Real Estate Development Case Competition, Fall 2020
- Club Activities: NAIOP Raleigh/ Durham, ULI, UNC MBA Real Estate Club, BBSA, NMBBAA

**CUNY BROOKLYN COLLEGE, Murray Koppelman Business School** — Brooklyn, NY May 2016

**Bachelor of Business Administration, Finance & Investments**

- Honors: Dean's List, Student Leadership Award Winner
- Club Activities: Brooklyn College Advisory board, Student Leadership Council (SLC) board, NABA

**AGITEL FORMATION, School of Engineering** — Abidjan, Ivory Coast May 2009

**National Diploma of Higher Education, Financial Accounting**

## EXPERIENCE

**SCHOLASTIC, INC.** — New York, NY 2016 - 2019

*Publishing, education & media firm, world largest distributor of children's educational books for pre-K to 12 grade*

**Overhead Business Analyst, Communications & Marketing (2018 - 2019)**

- Managed two overhead divisions annual budget (\$8M+); lead to 2-3% year-over-year (YOY) cost reductions
- Reviewed and reconciled consolidated financials by LOBs (P&L, BS and FCF) before quarterly BOD meetings
- Prepared monthly, quarterly and annual budget/forecast and analyzed YTD actual variances; communicate gaps
- Calculated corporate allocations and charged-back non-overhead businesses, reducing expenses accrual by 1/3

**Senior Financial Reporting Analyst, Corporate Finance (2017 - 2018)**

- Prepared monthly GAAP free cash flow, allowing liquidity assessment across all Scholastic LOBs
- Built 5-year cost-saving model and Pro-forma; resulted in \$90-100K yearly savings across 15+ LOBs
- Remodeled P&L templates used companywide, improving cross-departmental reporting timing by 1-2 days

**Financial Reporting Analyst, Corporate Finance (2016 - 2017)**

- Assessed various Scholastic segments spending and overhead allocations; resulted in 5% higher profitability
- Revised weekly sales reports by LOBs, booked JE and ensured on-time expenses recognition before month-end

**S&P GLOBAL** — New York, NY 2016 - 2016

*Formerly McGraw-Hill, Inc. publicly traded corporation providing financial information and analytics worldwide*

**Consultant, S&P Global Market Intelligence**

- Built data sorting models in Salesforce and Excel to lower client's data processing time; 50+ accounts daily
- Bolstered database updates, enhancing clients' outreach and account management for 3 departmental directors

**IDEAL PROPERTIES GROUP** — Brooklyn, NY 2016 - 2016

*Residential and commercial Real Estate brokerage with properties in Brooklyn and Manhattan, NY*

**Sales Intern, Commercial Real Estate**

- Promoted over 25 new under-contract properties weekly, leading to 30% higher sales and rentals per agents
- Organized advertising campaign and assigned 30+ new properties showing weekly - 1/2 of client liaison tasks

## ADDITIONAL

- US Permanent Resident; NY Real Estate License (Candidate); Fluent in French (Native)
- Volunteer: Hunger Relief Program, One Hundred Black Men of NY; Fund Raiser, National MS Society
- Hobbies: Runner (Co-founder, Newark Running Club); Cyclist (2018, 2019 Multiple Sclerosis, 100-Miler)

# QUINN AUGUSTINE

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(704) 877-5952

<https://www.linkedin.com/in/quinnaugustine/>

## EDUCATION

**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2021

**Master of Business Administration**, Full-Time MBA Program

- Concentrations in Real Estate & Corporate Finance
- MBA Real Estate Club VP of Corporate Relations

**CLEMSON UNIVERSITY** – Clemson, SC

May 2016

**Bachelor of Science**, Civil Engineering, GPA 3.50

- William A. Kenyon and Alice S. Kenyon Scholarship

## EXPERIENCE

**CRESCENT COMMUNITIES** – Charlotte, NC

Summer 2020

*Nationally recognized, market-leading real estate investor, developer, and operator of commercial real estate*

**Summer Associate, Commercial Development**

- Evaluated potential pursuits by conducting market studies and underwriting 8 development and acquisitions opportunities throughout the country
- Performed diagnostics of unexecuted projects in a new market to identify root causes of expected project returns underperforming company standards and requirements
- Benchmarked economic activity in assigned markets by tracking rents, sales comparables, operating costs, competitive supply, and economic expansion activity

**DPR CONSTRUCTION** – Washington, DC Metro Area

2016-2019

*General contractor specializing in technically complex projects, generating \$4+ billion annual revenue*

**Senior Project Engineer** (2018-2019)

- Oversaw \$125M+ data center project completed in world record-setting 128 days and awarded Engineering News Record's 2018 Best Projects Award of Merit Manufacturing
- Supervised \$12M+ interior and façade renovation of 192K sq. ft. luxury office space; designed and implemented construction approach to satisfy the tenant occupied building constraints
- Managed financial, schedule, and scope changes to owner contract and 20+ trade subcontracts to ensure workflow and cashflow aligned with project requirements

**Project Engineer** (2016-2017)

- Coordinated construction schedule and material procurement with 20+ subcontractors and design teams to ensure project was meeting schedule milestones and design requirements
- Organized ~45 subcontractor bids and scopes of work to create owner proposals and estimates

**MARAND BUILDERS** – Washington DC, Maryland, & Virginia

2018

*General contractor specializing in operational financial center accelerated renovation*

**Senior Project Engineer**

- Increased average profit from 6% to 12% on projects less than \$100K by instituting in-house estimating and scheduling rather than outsourcing to another department
- Led up to 10 projects at a time with an average contract value of \$275K per project; oversaw projects from estimating, issuing subcontracts, managing operations alongside superintendents, and turnover

## ADDITIONAL

- Lean Leadership Certified, LeanCor
- College Bound Program, Mentor
- TOPSoccer and TOPBaseball, Coach. Volunteered helping special needs athletes aged 4-16
- Shooting range manager at A Bar A Ranch, Encampment, WY

# WILLIAM B. BARRETT

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www.linkedin.com/in/william-barrett

## EDUCATION

**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2021  
**Master of Business Administration**, Full-Time MBA Program; Concentration in Real Estate

**ROANOKE COLLEGE** – Salem, VA May 2012  
**Bachelor of Business Administration**, Finance & Marketing

## EXPERIENCE

**KFBSF REAL ESTATE FUNDS** – Chapel Hill, NC December 2019 - Present  
*Student-led series of closed-end real estate private equity funds totaling \$12M+ in equity commitments*

### Fund Manager | Investments & Asset Management

- Identify and evaluate new investment opportunities; support all phases of the transaction process which includes reviewing OMs, conducting market, operating, and financial due diligence, constructing detailed financial models, and drafting IC memoranda
- Provide ongoing asset management and investor relations assistance which includes maintaining financial models, writing quarterly and annual reports, updating LP meeting presentation materials, and fundraising

**BROOKFIELD PROPERTIES** – New York, NY Summer 2020  
*Part of multifamily development team focused on acquisitions and development in the Northeast*

### Summer Associate | Development

- Performed research and prepared recommendations for senior management and team on the impact of COVID-19 on NYC multifamily and two Brookfield assets currently in lease up (One & Two Blue Slip)
- Supported underwriting for two ground up mixed-use developments in Manhattan and Brooklyn

**AKRIDGE** – Charlotte, NC Summer 2020  
*Based in Charlotte office focused on multifamily and office acquisitions and development in North Carolina*

### Summer Associate | Development

- Created equity memoranda for 420-unit multifamily development and a creative office redevelopment
- Managed market study process for and verified underwriting assumptions for a 420-unit multifamily development resulting in updated model, design, and layout
- Supported underwriting, PSA negotiation, and due diligence for 325-unit multifamily development

**JLL** – New York, NY 2018-2019  
*Part of 65-person team acquired by JLL to build out middle market investment sales platform in NYC*

### Vice President | Investment Sales

- Mandated to sell \$500M+ of development assets on behalf of private and institutional investors
- Underwrote \$2B+ of potential property sales by modeling income and expense pro formas, DCFs, and development models across multiple asset classes in Brooklyn & Queens
- Worked within JLL and with consultants to distill due diligence materials into pitch books and OMs

**CUSHMAN & WAKEFIELD** – New York, NY 2014-2018  
*Investment Sales broker in Brooklyn 2015-2018; Tenant Representative broker in Manhattan 2014-2015*

### Associate Director, Senior Associate, Associate | Investment Sales & Tenant Representative

- Canvassed, pitched, and executed the sale of 27 properties (\$250M+) on behalf of private investors
- Managed day-to-day operations of a 3-person investment sales team and summer interns
- Authored internal and external market analytics reports covering Brooklyn capital markets
- Brokered and negotiated 100,000+ SF of leases on behalf of technology companies

## ADDITIONAL

- Woodberry Forest School, Art Students League, American Enterprise Institute, ULI & NAIOP Member
- Interests include: Cooking, Biking, Tennis, Golf, Painting, Traveling, Architecture & Design

# JOHN F. BLIZZARD

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linkedin.com/in/john-blizzard/

## EDUCATION

**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2021  
**Master of Business Administration**

- Concentration in Real Estate and Corporate Finance, GMAT 720
- Fund Manager for the KFBSF Real Estate Funds – member of a select group of students responsible for the investment and management of \$10M across three active real estate private equity funds
- Steven L. Bean Real Estate Fellow – Partial Tuition
- Dean's Fellow – Premier leadership program offered to select fellowship recipients
- 2<sup>nd</sup> Place, National Real Estate Challenge – Case competition with 20 teams from top MBA programs

**WASHINGTON AND LEE UNIVERSITY** – Lexington, VA May 2014  
**Bachelor of Arts, Economics, Politics (Double Major), GPA 3.5**

- Varsity Football, Middle Linebacker

## EXPERIENCE

**WELLTOWER** – New York, NY Summer 2020

*Public REIT primarily focusing on senior living and medical office properties*

**Summer Associate, Investments**

- Underwrote four senior living developments for mezzanine debt investment, performing initial underwriting, building full financial/operating models, and creating market study/rent comp analyses
- Consulted on the establishment of an acquisition platform and underwriting criteria for age-restricted active adult communities, leveraging prior experience
- Led underwriting process for a \$21M active adult community, culminating in an LOI and, subsequently, the first acquisition for the new platform

**CSM CAPITAL CORPORATION** – New York, NY 2014-2019

*Family office managing assets for 20 high net worth families. Firm constructs diversified portfolios across a broad range of investments, allocating assets to underlying funds, managers, and direct investments.*

**Associate, Focusing on Real Estate Investments (2015-2019)**

- Served as sole associate on seven-person investment committee allocating \$1.2B of capital
- Led team responsible for the Firm's underwriting, due diligence, and closing process in the deployment of \$159M of equity across 19 multifamily and 9 self-storage real estate transactions
- Developed investment thesis on the self-storage asset class, culminating in the establishment of First Neck Self-Storage Fund, a \$53M real estate private equity fund acquiring stabilized self-storage facilities in primary and secondary markets
- Sourced the Fund's joint venture partner and participated in the review and negotiation of legal documents to establish fund structure
- Created material for and participated in successful fundraising of \$53M in fund commitments
- Presented transaction memos, reviewed and approved property acquisition decisions as member of investment committee
- Managed closing process between multiple parties including lender, seller and multiple legal teams
- Structured asset management process to monitor property performance and facilitate fund-level distribution decisions

**Analyst (2014-2015)**

- Built comprehensive operating and financial models to evaluate investment opportunities
- Sourced, analyzed, and monitored allocations to outsourced managers and direct investments

## ADDITIONAL

- **Chartered Alternative Investment Analyst (CAIA)**, Completed two-level professional certification, balancing 400+ hours of study with full-time employment. Quantitatively intensive coursework covering valuation techniques for real assets, hedge funds, private equity, structured products, and portfolio construction/risk management
- Mentor to a high school student for whom CSM Capital sponsored tuition
- Interests include classical history, real estate investing, coaching, improv classes

# ANDRES CASADO

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## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2021

**Master of Business Administration**, Full-Time MBA Program

- Concentrations in Marketing and Real Estate
- Hartzell Real Estate Fellowship and Kenan-Flagler Merit Fellowship – Full Tuition
- Consortium for Graduate Study in Management – Member
- STAR Consulting Project Leader (Spring 2020) – Developed a new product launch marketing strategy for a Global 500 pharmaceutical and life sciences company.

**BENTLEY UNIVERSITY** – Waltham, MA

May 2015

**Bachelor of Science**, *magna cum laude*, Economics and Finance, GPA 3.73

- Awards: President's and Dean's List all semesters
- Honor Societies: Beta Gamma Sigma, Omicron Delta Epsilon, Bentley Honor Society

**LONDON SCHOOL OF ECONOMICS** – London, United Kingdom

2013-2014

- Full-Year Study Abroad Program

## EXPERIENCE

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**NORTHWESTERN MUTUAL** – Durham, NC

Summer 2020

*Fortune 500 life insurance company managing over \$49 billion in debt and equity real estate investments.*

**Real Estate Associate Intern**

- Underwrote and completed due diligence for a live deal valued at \$24.35 million; generating \$770,000 in excess returns over the life of the loan relative to securities of equivalent risk.
- Performed a hold-sell analysis for a property valued at \$79 million, presenting recommendation to senior leadership of the asset management team.
- Led research and conducted multiple interviews for a new asset class recommendation whitepaper.

**HARMONY RESIDENCES, C.A.** – Caracas, Venezuela

2018-2019

*Start-up aiming to develop and operate full-service 55+ residences across Venezuelan cities, planning an IPO.*

**Senior Advisor**

- Managed the process to fulfill the organizational and legal requirements to list the company on the Caracas Stock Exchange, while navigating the political environment, unstable basic services, and capital controls.
- Developed bank relationships to secure loans, working alongside the executive team.

**MANAGEMENT SOLUTIONS** – Boston, MA

2015-2018

*Spanish consulting firm serving the banking, energy, telecom, and government sectors on five continents.*

**Senior Consultant** (primarily with a Global 100 Bank)

- Led a 4 person team validating the data quality of financial systems, identifying errors of potential high negative impact in 2% of items. Project renewed with expanded scope.
- Completed 4 yearly bank system assessments to ensure compliance with risk management principles, improving compliance by 36% in 2018. Project renewed for 3 additional years.

**Associate Consultant**

- Worked in Project Management with Market Risk team ensuring system implementations and project deployments advanced on time and within budget.

## ADDITIONAL

- 
- CoStar, Bloomberg, Moody's MRA, Advanced Excel Modeling
  - Fluent in Spanish
  - President of the LATAM Club at KFBS
  - Co-Founded a Corporate Soccer Club for company employees

# JUSTIN S. COHEN

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## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2022

**Master of Business Administration**, Full-Time MBA Program

- Concentrations in Corporate Finance and Real Estate

**DREXEL UNIVERSITY, Lebow College of Business** – Philadelphia, PA

June 2016

**Bachelor of Arts in Business Administration**, General Business

- Dean's List Scholar (2013-2016)

## EXPERIENCE

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**CIVIC FINANCIAL SERVICES (WEDGEWOOD INC.)** – Redondo Beach, CA 2018-2020

*Debt fund using institutional capital specializing in <100 unit residential investment properties*

**Senior Account Executive**

- Originated secured debt through collateral/sponsor underwriting, investment analysis, asset valuation modeling, lead generation, and client relationship management
- Led company in overall production; \$80M+ in total production volume, across 100+ closed deals translating to \$1.7M - \$2.2M of total revenue produced for company
- Managed two Account Executives, analyzed and helped to structure 25+ weekly scenarios for the greater team while maintaining a personal pipeline of 20+ loans; increased team performance by 3x

**PATCH OF LAND** – Los Angeles, CA

2017-2018

*Platform matching institutional investors to clients seeking funding for commercial and residential assets*

**Loan Officer** (2017-2018)

- Generated \$10M+ of debt financing, established a book of business, analyzed client projects using cost, income and sales valuation methods and pre-underwrote loan scenarios and client profiles
- Produced and closed all new business, controlling a pipeline of 15+ real estate loans at any given time, while simultaneously onboarding and training 2 new Transaction Coordinators

**Transaction Coordinator** (2017)

- Developed the Transaction Coordinator position as Patch of Land's first hire; resulted in a boost to overall loan production by ~25% month over month
- Trained and managed an offshore team of pre-underwriters, lead generators, setup specialists, and administrators; led to integration of 100% overnight loan set-up to processing and 20+ leads generated

**RIDGEWOOD REAL ESTATE PARTNERS** – Florham Park, NJ

2016-2017

*National real estate developer, investor, and advisor specializing in land use and entitlements*

**Acquisitions Associate**

- Conducted all facets of acquisitions process including financial analysis, market research, due diligence for SFR, multi-family, and mixed-use land developments; led to \$50M+ in closed acquisitions
- Analyzed *pro forma*, residential underwriting, land use, entitlements, and numerous BOE valuation models including DCF, NPV, and IRR metrics

## ADDITIONAL

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- Certifications: Bloomberg Certification, New York State Real Estate License
- Skills: Structured Real Estate Debt, Financial Modeling, Cash Flow Analysis, MLS, Real Estate *pro forma*, Sales Management, SEO: Google AdWords Analytics, Mortgage Underwriting, Salesforce
- Interests: Yoga, Gymnastics, Coaching, Functional Patterns, Tennis, Golf, Basketball, Travel

# ALEX DILLON

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## EDUCATION

**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2021

**Master of Business Administration**, Full-Time MBA Program

- Concentrations in Real Estate and Corporate Finance
- UNC Kenan-Flagler Merit Fellowship – Partial tuition
- Vice President of the UNC Real Estate Club

**UNIVERSITY OF NORTH CAROLINA at Chapel Hill** – Chapel Hill, NC

May 2013

**Bachelor of Arts**, Economics

## EXPERIENCE

**USAA REAL ESTATE** – San Antonio, TX

Summer 2020

**MBA Summer Associate, Office and Industrial Development**

- Worked as a member of a team to execute the development process – including underwriting, due diligence, and obtaining investment committee approval

**LINCOLN HARRIS** – Charlotte, NC

2017 – 2019

*Lincoln Harris Corporate Services Group representing Atrium Health*

**Development Associate** (2019)

- Led a 4-person team on the acquisitions of 5 commercial properties, totaling \$20M
- Worked effectively with a 3-member team on the acquisition of a health care system's real estate components, totaling 150 buildings
- Directed pre-development due diligence efforts on acquisitions and dispositions of real property

**Development Assistant** (2017-2018)

- Designed and implemented an Excel-based forecasting model, shared at an executive level for a 10-person team to track lease transaction metrics
- Performed financial analyses of properties for development, acquisition, disposition, lease terminations, and consolidations, identifying their overall impact to Atrium Health's 450-property portfolio

**THE BEACH COMPANY** – Charleston, SC

2014 – 2017

**Commercial Real Estate Broker**

- Executed 31 lease and sale transactions with a total gross value of \$7.5M
- Represented a third-party client on the sale of a 15K square foot law office building for \$4.95M
- Recipient of the '2016 Beach Company Captain's Cup Award' recognizing the commercial real estate broker within the company with the most improved gross sales volume from the previous year

**THE LUNDY GROUP** – Raleigh, NC

2013 – 2014

**Assistant Commercial Property Manager**

- Managed 1.5M square feet of retail shopping centers, mixed use developments, medical offices, specialized medical warehouses, clinic spaces, hospital support facilities, and commercial offices
- Created, tracked, and ensured a reasonable budget for each property

## ADDITIONAL

- **Certifications:** North Carolina Broker License, South Carolina Salesman License
- **Affiliations:** National Association of Realtors, UNC Real Estate Club
- **Interests:** Sailing, Running, Road Cycling, Fly Fishing



# STEPHEN A. DYE, CFA

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## EDUCATION

**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2021  
**Master of Business Administration**, Full-Time MBA Program

- Concentrations: Real Estate, Capital Markets & Investments (Applied Equity Analysis); GMAT 700
- Wood Center for Real Estate Studies, Fellowship – Partial Tuition

**UNIVERSITY OF NOTRE DAME, Mendoza College of Business** – Notre Dame, IN May 2011  
**Bachelor of Business Administration Cum Laude**, Finance and Political Science, GPA 3.725

- Semester Abroad, The University of Notre Dame Australia – Fremantle, Australia

## EXPERIENCE

**METLIFE INVESTMENT MANAGEMENT - REAL ESTATE** – Atlanta, GA Summer 2020  
**Summer Associate**

- Underwrote and presented ten real estate development/acquisition opportunities, totaling \$700M
- Presented development/acquisition deals to internal investment committee and separate account clients
- Closed two separate joint venture agreements between MetLife and its development partners
- Created and managed a database of 174 Class A office properties throughout the southeast
- Managed monthly construction cost reconciliation for \$270M Swan Hotel expansion in Orlando, FL

**CONDOR HOSPITALITY TRUST, INC.** – Bethesda, MD 2016-2019  
**Corporate Earnings Analyst**

- Developed and maintained the company's earnings model, used for public reporting/earnings guidance
- Secured new \$90M revolving credit facility with KeyBanc Capital Markets; later expanded to \$150M
- Coordinated Condor's \$50M equity offering by managing 6 joint book-running investment banks

**ROBERT W. BAIRD & CO.** – Chicago, IL & Reston, VA 2013-2016  
**Equity Research Associate – Institutional Equities & Research** (2015-2016)

- Reported on 20+ publicly traded REITs across the industrial, office, data center, and MLP sectors
- Advised management teams on non-deal roadshows; facilitated discussion with investing clients

**Equity Research Analyst – Institutional Equities & Research** (2013-2015)

- Covered 20+ publicly traded REITs across the multifamily, storage, and manufactured housing sectors
- Directed initiation of new research for the Manufactured Housing sector

**FIRST ANNAPOLIS CONSULTING AND M&A ADVISORY** – Linthicum, MD 2011-2013  
**Analyst – Deposit Access Practice**

- Analyzed credit, debit, and mobile payment industries through research, surveys, and model building
- Authored 2 published articles for the firm's monthly industry journal "The Navigator"

**THE WALT DISNEY COMPANY** – Lake Buena Vista, FL Summer 2010  
**Finance Business Associate – Walt Disney Imagineering Resort Real Estate Development**

- Developed analytical tools to streamline both the 5 year and annual operating plan processes
- Built break-even analysis with various cost reduction scenarios for a \$400M residential community

## ADDITIONAL

- Memberships: CFA Society Washington, DC; Daniel Murphy Scholarship Fund - Full Circle Society
- Software: Argus, FactSet, CoStar, S&P Market Intelligence, CBRE-Econometrics, Blue Matrix, JMP
- Interests: Formula One, Travel, Soccer, College Football, Movies, Trivia, Golf

# CAROLINE H. GILL

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## EDUCATION

**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2021

**Master of Business Administration**, Full-Time MBA Program

- Concentration in Real Estate; GMAT 730
- Forté Foundation Fellowship & The Fritsch Fellowship (Full Tuition)
- Dean's Fellows Program – Honor reserved for select fellowship recipients

**WASHINGTON & LEE UNIVERSITY** – Lexington, VA

May 2014

**Bachelor of Arts**, Economics; Mathematics (Minor); GPA 3.90 (Magna Cum Laude)

- Phi Beta Kappa (Top 5% of class)
- Semester Abroad, The University of Oxford – Oxford, England

## EXPERIENCE

**KENAN-FLAGLER REAL ESTATE FUNDS** – Chapel Hill, NC

2020-Present

**Fund Manager**

- Manage day-to-day operations of the student-run private real estate funds, including identification and evaluation of investment opportunities, asset management, investor relations, and quarterly reporting
- Lead asset manager for six real estate assets representing \$1.8 million of the Funds' equity investments

**CRESCENT COMMUNITIES LLC** – Charlotte, NC

Summer 2020

**Summer Associate, Finance & Capital Markets**

- Created equity and debt offering memorandums for multifamily, industrial, and office developments
- Reviewed and summarized joint venture equity and construction loan documents
- Performed research and prepared recommendations for the CEO and CIO on several key strategic growth initiatives, including profiling and prioritizing over 100 investor targets
- Updated pro-forma financial models for development projects with new forecasts and budgets

**J.P. MORGAN CORPORATE & INVESTMENT BANK** – New York, NY

2014-2019

**Associate, Real Estate & Lodging Debt Capital Markets** (2016-2019)

- Originated unsecured corporate bonds and syndicated loans for Investment Grade Real Estate & Lodging clients, issuing over \$35B of debt capital
- Built relationships with CFO and Treasury clients at more than 25 REIT and Lodging companies across the U.S. by providing relevant market color and advice on achieving best market executions
- Managed a team of two analysts with primary responsibility for training and career development; both analysts promoted to associate

**Analyst, International Corporates & Liability Management** (2014-2016)

- Structured U.S. dollar corporate bonds for internationally domiciled Investment Grade corporations; executed over \$70B in debt offerings
- Partnered with international Debt Capital Markets teams to market J.P. Morgan's U.S. debt platform by analyzing and presenting data on target capital structure, market conditions, and investor appetite
- Executed liability management strategies for international and domestic clients in order to optimize debt portfolios, predominately in M&A scenarios

## ADDITIONAL

- Teaching Assistant (Finance, Managerial Accounting); Career Mentor for MBA Class of 2022
- Urban Land Institute (ULI) Member; ULI Triangle Women's Leadership Initiative Mentorship Program
- Interests: Ancestry/genealogy; UNC football; golf; hiking

# DEMETRI HARAKAS

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## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2021  
**Master of Business Administration**, Full-Time MBA Program

- Concentration in Real Estate
- Team placed 1<sup>st</sup> in 2019 Kenan-Flagler 1Y Real Estate Case Competition

**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2015  
**Bachelor of Business Administration**, Concentration in Finance

- Honors: Gravely Study Abroad Scholar, Bryan Social Innovation Fellowship Recipient
- Activities: Real Estate Club, Consulting Club, UNC Club Baseball, Chi Psi Fraternity
- Study Abroad: Lorenzo De' Medici Institute – Florence, Italy

## EXPERIENCE

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**PACIFIC LIFE** – Newport Beach, CA (Virtual) Summer 2020

### **Real Estate Investments Intern**

*Intern rotation with Pacific Life's Real Estate equity team and DC field office debt team*

- Underwrote acquisition and construction/perm loans sized from \$45-200M of multifamily, mixed-use, and office assets
- Researched, underwrote, and presented an \$85M multifamily equity investment recommendation to the equity group and developed asset management exposure to the current equity portfolio
- Analyzed and sourced investment opportunities primarily across east coast markets
- Studied and presented the impact of climate risk on real estate investments to the entire real estate team
- Utilized the following Real Estate software applications: ARGUS, CoStar, Axiometrics, and redIQ

**SITUS** – Washington, DC 2018-2019

### **Senior Consultant**

*Provided regulatory and compliance services for mortgage finance firms in Situs's Residential division*

- Performed claims loss analysis of 6.5K loan files with \$38.4M in damages to support a high-profile litigation engagement
- Developed strategic 2-year plan for a US Govt. housing entity's appraisal data portal that identified the benefits/risks of various plans and the effects on the portal's user experience and competitive advantage

**IBM** – Washington, DC 2015-2018

### **Senior Strategy Consultant (2017-2018)**

*Collaborated with clients primarily on organizational assessments and business process improvements*

Key Consulting Project: Large Travel & Transportation Company – Go-To-Market Strategy

- Developed competitive analysis of current and potential competitors to identify market opportunities and determine the pricing strategy of current products
- Identified and analyzed target customer personas and target markets to understand customer needs through a Design Thinking workshop to facilitate and define a product relaunch strategy

**Consultant (2015-2017)**

## ADDITIONAL

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- **Career & Leadership Mentor** – Real Estate career mentor to first-year MBA students
- **IBM DC LEAD (Co-chair)** – Organized events in the DC area to promote professional development, networking, and community service for roughly 250 IBM employees
- **Ducks Unlimited (Fundraising Chair)** – Pioneered fundraising \$24K for the UNC chapter

# FIELDING L. HARRISON

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## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2022

**Master of Business Administration**, Full-Time MBA Program

- Concentrations in Corporate Finance and Real Estate; Enrichment in Entrepreneurship; GMAT 730
- Horey Family MBA Fellowship – Partial Tuition

**UNIVERSITY OF VIRGINIA** – Charlottesville, VA

May 2016

**Bachelor of Science**, Civil Engineering – Structural Concentration

- McIntire Business Institute Certificate, Summer 2016, Distinction (studied Accounting and Finance)
- American Society of Civil Engineers, Vice President (University of Virginia Chapter)
- 2016 Civil Engineering Capstone Project, Winning Team

## EXPERIENCE

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**BALFOUR BEATTY PLC** – Washington, D.C.

2016-2020

*Global engineering & construction firm (\$10B+ Revenue)*

**Assistant Project Manager** (2019-2020)

- Negotiated subcontract for \$5.2M, creating estimated cost savings of \$450K for the Owner
- Reconciled \$250M budget to prepare accurate monthly invoices to the Owner for project's duration
- Managed work of 6 subcontractors with approximately \$40M in aggregate contract value
- Spearheaded regional launch of a new Job Management System; coordinated logistics of software implementation with nation-wide team; trained 14 teammates

**Senior Project Engineer** (2018-2019)

- Built and managed a 26-week schedule for the Altaire's 20th Floor amenity space; completed on time
- Directed the Project Closeout phase to ensure a seamless turnover of building to the Owner
- Negotiated financial settlements, totaling \$650K, with 11 Subcontractors; finished project on time and under budget, generating a final profit 33% above projections and leading to early promotion

**Project Engineer** (2016-2018)

- Supervised 17 subcontractors with approximately \$16.5M in aggregate contract value
- Scheduled, coordinated and designed the \$150K foundation wall removal operation; granted Balfour Beatty's Above and Beyond award for safely executing the complex work and generating budget savings
- Planned a 20-week schedule for and led completion of 2 apartment mockups, approved by the Owner
- Led estimating and purchasing of 6 subcontracts totaling \$1.26M in value, generating budget savings

**J.A. HEISLER CONTRACTING CO. INC.** – Richmond, VA

2013-2014

*General contracting firm serving greater Richmond area*

**Construction Superintendent**

- Managed 5 projects valued up to \$315K, executing strategic solutions to unexpected daily problems

## ADDITIONAL

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- **Community:** Habitat for Humanity Young Professionals D.C. Board – Community Engagement & Advocacy Chair; Bridges to Prosperity – Fundraiser for Balfour Beatty
  - **Languages:** Spanish (Conversational) – Studied abroad in Seville, Spain while living with a host family
  - **Hobbies/Interests:** Running – organized and led a team of 12 in the Spartan Race in Nationals Park in Washington, D.C.; Fishing – embarked on fly fishing trips on the Colorado and Rio Grande rivers and on saltwater fishing excursions off the coasts of Maine, Virginia, and South Carolina

# HARRIS HUDSON

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## EDUCATION

**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2021

**Master of Business Administration**, Full-Time MBA Program

- Concentrations: Real Estate and Corporate Finance; Emphasis: Sustainability

**UNIVERSITY OF VIRGINIA** – Charlottesville, VA

May 2011

**Bachelor of Arts**, Foreign Affairs, 3.62 GPA

- Graduated with Distinction; Army ROTC, President

## EXPERIENCE

**REALCO CAPITAL PARTNERS** – Stamford, CT

Summer 2020

**Summer Associate – Investment Team**

- Conducted market research and initial underwriting on 26 student housing investments with an average valuation of \$65MM, including a competitive 8-property listing in the nation's fastest growing states
- Sourced, underwrote, and presented to the investment committee a \$111MM value-add project with a special emphasis on reducing risk associated with enrollment and the global pandemic
- Selected to assess and recommend improvements to the company's market analysis process; after weeks of interviews and primary research, issued a report formalizing key procedures across the firm

**HALFACRE CONSTRUCTION COMPANY** – Sarasota, FL

2019

**Project Management Intern**

- Served as assistant project manager on 16 commercial construction projects with an average value of \$2.3MM; gained wide exposure to operations, finance, human resources, and marketing departments
- Analyzed blueprints and site constraints, developed budgets and schedules, presented bid proposals, awarded subcontracts, and facilitated communication among architects, engineers, and developers
- Developed a real-time entitlement tracking system to eliminate permit expiration fees; strengthened relationships with public officials to expedite plan reviews, inspections, and occupancy certifications

**UNITED STATES ARMY** – Ansbach, Germany; Baghdad, Iraq; Fort Riley, Kansas

2011-2019

**Aviation Officer (UH-60 Black Hawk)**

- Trained and led the first aviation unit deployed to the Baltic States to support NATO allies in crisis; maintained high alert to respond to emergencies across Europe with 5 helicopters and 15 crewmembers
- Orchestrated logistical support across 5 countries for 400 soldiers, 30 helicopters, and 130 vehicles; authored 3 international support agreements; prepositioned vital equipment and supplies across Europe
- Served as deputy aviation advisor for high-risk, emergency operations, e.g. medical evacuation and downed pilot recovery; advised general officers on the employment of helicopters and drones in combat
- Prioritized and synchronized all helicopter movements in Iraq; devised complex scheduling solutions daily; supervised over 250 combat missions and over 400 VIP movements
- Managed the flight hour budget for 113 helicopters; monitored execution of \$70MM funding strategy; developed a plan to increase efficiency and save the unit \$6.8MM
- Reengineered the entire information management system and standard operating procedures; decreased unit mobilization time from weeks to days and mission planning time from hours to minutes

## ADDITIONAL

- Certifications: Advanced Real Estate Finance (NAIOP); Construction Project Management (Procore)
- Musician: composes, performs, and records on guitar, drums, bass, and piano
- Married college sweetheart; 2 children; family ping pong champion

# SAMUEL B. JACKSON

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linkedin.com/in/samueljackson5

## EDUCATION

### UNIVERSITY OF NORTH CAROLINA at Chapel Hill

May 2022

#### Bachelors Science Business Administration (BSBA), GPA 3.721; Dean's List; ACT: 35

- The Medlin Scholarship for Business and the Liberal Arts – London School of Economics
- Kenan-Flagler Business School Class of 2022 – Assured-Admit Student – group of about 70 students that are guaranteed admissions into the highly selective Kenan Flagler Business School
- Cornell Case Competition 2020 – selected to compete in a Real Estate Case Competition in 2020

## EXPERIENCE

### Sweets By Sam – Dallas, TX

June 2020 - Present

#### Founder/Baker/Financial Associate/Marketer

- Combined my love for baking with the current state of our world in COVID-19 to create a baking business, applying knowledge from business school classes into a real-world setting.
- Created specific price points for menu items to cover hard costs (COGS) and soft costs (labor cost per hour) to generate a 20% net margin per order from recipe to recipe, resulting in a \$1,500 net income.
- Marketed the new business to the community through social media platforms such as Facebook and Instagram.

### Cornerstone Homelending Inc. – Dallas, TX

June 2019 - August 2019

#### Lending Assistant

- Learned the basics in mortgage and residential real estate lending related to processing, underwriting, and basic mortgage guidelines.
- Assisted mortgage processing team daily by ordering collateral services such as title insurance, appraisals, homeowner's insurance, and land surveys. Also called the necessary underwriting documents such as IRS tax transcripts and verifications of employment and income.
- Packaged/delivered buyer and real estate agent's gifts. Assisted in creating new branding ideas for the marketing department for each loan officers' team.

### Quest Capital Management Inc. – Dallas, TX

June 2019 - August 2019

#### Management Assistant

- Learned the mechanics of financial management and planning business and strategies tailored to specific client needs.
- Evaluated confidential contracts and discussed agreement terms with the strategies team.
- Scanned contracts and agreements into the online system and broke down/categorized all documents by type.

## LEADERSHIP AND COMMUNITY INVOLVEMENT

### University of North Carolina Real Estate Club, Chapel Hill, NC

January 2019 - Present

#### Vice President of Operations (February 2020 – Present)

- Handled all aspects of company recruiting treks from a student perspective (Selection of students, carpool logistics, lodging logistics, pre-departure meeting) and helped set up annual Real Estate Boot Camp.
- Booked rooms for events, maintain organizational records, and contribute to regular executive team meetings.
- Collaborated with the Presidents of the club to map out meetings, generate potential guest speakers, and create a beneficial learning model for other undergraduates to have an enhanced learning experience.

### Carolina Homelessness Prevention Initiative, Chapel Hill, NC

December 2018 - Present

#### Fundraising Advisor

- Fostered beneficial changes for people in the Chapel Hill community who have suffered from major adverse life events, including homelessness.
- Aided people cast into homelessness due to family separation, job loss, or drug/alcohol abuse, among other things, raised donations to help simply supply families with meals, shelter, and clothing.

## ADDITIONAL INFORMATION

- Intermediate Spanish Speaker/Writer/Listener
- Real Estate Trek to Atlanta (January 2020)
- Experienced in Excel formulas, graphs, and data analysis/Upcoming Argus Training Spring of 2021

# THOMAS D. KEATING

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## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** - Chapel Hill, NC May 2022

**Master of Business Administration**, Full-Time MBA Program

- Concentration in Real Estate
- Merit Fellowship Recipient- Partial Tuition

**BINGHAMTON UNIVERSITY, School of Management** - Binghamton, NY May 2017

**Bachelor of Science in Business Administration**, GPA 3.64

- Graduated with Honors, Cum Laude

## EXPERIENCE

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**M&T BANK** - Various Locations 2017 - 2020

**Relationship Manager** (2018 - 2020)

- Managed portfolio of 20+ business and commercial clients by negotiating and structuring deposits, term-loans, lines of credit and other bank services
- Originated more new business loans and took more applications than all but one employee in the Capital Region
- Coached and developed junior staff members on all aspects of new customer acquisition, relationship management, credit and KYC
- Facilitated regional leadership calls when manager was unable to attend to discuss new procedures, products or changing conditions in market
- Increased community presence and non-profit relationships by volunteering with various community organizations including Habitat for Humanity and NYS Special Olympics

**Commercial Real Estate Credit Training Program** (Fall 2019)

- Prepared credit memos and evaluated level of risk by determining loan-to-value, collateral, debt service, guarantor strength and construction budget
- Analyzed phased environmental reports, market demographics and ownership structure to present to loan committee

**Management Development Program** (2017 - 2018)

- Completed intensive year-long rotational training program working with various departments to develop skills and knowledge required to become a leader in financial services industry

**ZIER KEATING HOLDINGS, LLC** - Albany, NY 2017 - 2020

**Co-Owner & Managing Partner**

- Invest actively by researching and modeling properties and market conditions to evaluate and acquire multi-family real estate for joint venture in the New York market
- Identify and manage 3rd party property management team to ensure required occupancy level, market-rate rent, and other performance metrics are obtained
- Passively acquire multi-family assets via syndication across the southeast United States where population trends are increasing, income is rising, and ability to increase NOI is more prevalent
- Compile monthly, quarterly and annual financial statements as well as other supporting schedules to identify trends and maximize after tax cash flow

## ADDITIONAL

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- Project Destined; Act as a mentor for REBNY (Real Estate Board of New York) to assist undergraduate minority students in achieving their goal of being equity stakeholders in NY real estate
- Nominated for Leadership Orange; Program designed to honor and connect top emerging business and community leaders throughout Orange County, NY
- New York State Mentoring Program; Design and administer financial literacy activities to assist low-income students achieve social and academic success on a weekly basis

# EDWIN A. KUHN III

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## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2022

**Master of Business Administration**, Full-Time MBA Program, Real Estate

- Real Estate Investment Concentration

**UNIVERSITY OF GEORGIA, Terry College of Business** – Athens, GA May 2015

**Bachelor of Business Administration**, Finance and Real Estate, GPA 3.54, Cum Laude

- UGA honors include Gridiron Club, Greek Horsemen, Delta Epsilon Iota, and Order of Omega

**LONDON SCHOOL OF ECONOMICS** – London, England July 2013

**Study Abroad Program**, Behavioral Fundamentals for Management

## EXPERIENCE

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**CBRE** – Charlotte, NC

2015 - 2020

**Senior Debt and Structured Finance Analyst** (2019 - 2020)

- Secured over \$3.8B in permanent, bridge, and mezzanine financing for institutional, high-net-worth, and developer clients across multiple geographies, asset types, and risk profiles
- Specialized in sourcing multifamily debt financing; closed over 175 multifamily loans across the United States, including transactions in 10 of the top 20 largest MSAs nationally
- Developed relationships with 75+ bank, life insurance company, agency, debt fund, and CMBS lenders to find most aggressive capital and tailored financing solutions for clients
- Produced over 100 highly customized financing memorandums on behalf of clients including in-depth financial forecasting, debt analysis, and valuation support for over \$4B in debt financing
- Experience with mixed-use properties, portfolio financing, 1031 Reverse Exchanges, credit facilities, JV equity structures, and pre-stabilized asset financing

**Debt and Structured Finance Analyst** (2015 - 2018)

- Lead underwriter providing clients with debt analysis for acquisition and refinance opportunities
- Hired as sole analyst for Multifamily finance team consisting of 3 industry veterans with over 60 years of combined commercial real estate finance experience
- Increased team efficiency and capacity by developing a new underwriting model, which helped achieve 3 straight record years in debt financing volume for CBRE Charlotte
- Evaluated clients' real estate portfolios and debt capitalization and prepared debt analysis and underwriting for over \$6B in potential financing solutions

**CASSIDY TURLEY COMMERCIAL REAL ESTATE** – Washington, D.C.

Summer 2014

**Leasing and Capital Markets Intern**

- Learned Commercial Real Estate leasing strategy from Office Leasing team (8 brokers) and asset valuation basics from Commercial Investment Sales team
- Reviewed market forecasts, discussed client pursuits, and recapped project timelines
- Accompanied leasing professionals on prospective tenant tours viewing available office space in the 160M+ sf Northern Virginia office market
- Completed and presented an in-depth analysis of available office space for 50M+ sf of Class A and B assets in the Northern Virginia submarket

## ADDITIONAL

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- Fundraiser for the Terry College of Business "10 for Terry" campaign
- Favorite activities include playing golf, skiing, and watching college football



# HUNTER B. LEAMAN

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## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** - Chapel Hill, NC May 2022

**Master of Business Administration**, Full-Time MBA Program

- Concentration in Real Estate; Enrichments in Entrepreneurship, Technology and Innovation Management
- Merit Fellowship Scholarship

**DEPAUW UNIVERSITY** - Greencastle, IN

May 2014

**Bachelor of Arts**, Media Communications

- Merit Scholarship, Writing Lab Tutor, Alpha Tau Omega Fraternity

## EXPERIENCE

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**BHP MARINE, LLC** - Mooresville, NC

2016 - 2020

**President**

- Co-led acquisition process by defining business fit, evaluating technology stack, and analyzing business data and product performance
- Set strategic direction and tactics and oversaw daily operations of the \$1M+ E-commerce business
- Restructured business to focus on growth and scalability; improved operations by implementing new systems for internal communication, customer relationship management, E-commerce management and analytics, and data analysis
- Strengthened profitability +10% by rationalizing catalogue—reduced total number of categories, SKUs, and suppliers to focus on core, high-margin products—optimizing pricing, and negotiating more favorable terms with key suppliers
- Reduced shipping costs ~40% by moving warehouse operations from Washington state to central Carolinas area; improved inventory management and enhanced fulfillment process by utilizing new warehouse systems technologies
- Streamlined complex supply chain processes by developing forecast models to predict quantity buys, changing import brokers, and simplifying FBA inventory management
- Increased traffic +2x and grew sales +2x on E-commerce store by transitioning to Shopify platform and executing a complete redesign of website

**LX LABS, LLC** - Mooresville, NC

2015 - 2020

**Founder and Lead Consultant**

- Founded lx labs to help entrepreneurs understand, design, develop, and commercialize app ideas
- Brainstormed, formulated, and executed new business ideas, advising clients through all stages
- Guided clients through an actionable brainstorming process by idea mapping, wire framing, interactive prototyping, and producing graphics, ultimately delivering user experiences designs, GUI styling, and branding assets
- Advised clients on business process, organization structure, and E-commerce best practices

## ADDITIONAL

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- Stanford Center for Professional Development - Certified Project Manager (CPM) certification
- stockMarketApp—designed and coded app, created branding, media, and content for website
- iOS Music Library Access—devised and published Unity3d plugin
- partycircl.es | Music Visualizer App—designed app from start to finish and published to App Store

## Education

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### University of North Carolina at Chapel Hill

*B.S. Business Administration*

Chapel Hill, NC

Expected May 2021

- **Cumulative GPA: 3.53 | Major GPA: 3.66**

### Honors, Awards and Memberships

- Kenan-Flagler Assured Admit Program, Honors Carolina Program, Real Estate Club
- Dean's List (Spring 2018 & 2019)
- The Investors Title Insurance Company Assured Admit Scholarship recipient
- *Full tuition, 4-year academic merit scholarship through UNC Kenan-Flagler Business School*

### Relevant Coursework

- Entrepreneurial Strategy and VC, Investments, RE Finance, Negotiations, Corporate Finance

## Experience

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### Cambridge Associates | Boston, MA

June 2020 – August 2020

#### Summer Investment Analyst

- Worked independently and with groups to develop and present multiple research projects related to investment strategies, trends, and managers spanning all asset classes
- Utilized company resources to analyze clients' portfolio holdings and performances, leading to restructuring recommendations for select client portfolios
- Leveraged CA's technologies, clients, and employees to expand my knowledge of asset management and institutional investing

### SAS Institute | Cary, NC

May 2019 – December 2019

#### Corporate Real Estate Intern

- Gained experience in the processes of strategy/planning, transaction management, design and construction, and property maintenance related to corporate real estate
- Engaged directly with senior management to strategize and establish appropriate metrics that need to be included in real estate portfolio, leading to increased efficiency during meetings and in conveying accurate information to necessary stakeholders
- Managed Global RE Portfolio in Excel through continuously gathering, inputting, and updating data on over 150 SAS properties

### EPC, Inc. | Charlotte, NC

June 2018 – August 2018

*Human capital management company with an emphasis on staffing, drug-screening, and background check solutions*

#### Client Management Intern

- Analyzed client utilization of services data and composed a presentation for stakeholders which illustrated the need for adjusted drug-screening operation hours, resulting in reduced operational costs and increased profit margins
- Implemented document management process for new line of business, increasing efficiency in document processing and recovery
- Processed customer inquiries and service requests in order to ensure customer satisfaction and maintain client base

## Leadership and Community Involvement

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### Student Hip -Hop Organization | Chapel Hill, NC

September 2017 – Present

#### Finance Committee Member

- Generated organizational funds through obtaining 3 company sponsorships
- Audited budgets and collaborated with team members regarding how to delegate funds
- Directed various marketing programs that attracted over 1K people in the immediate community to organizational events

### Carolina Real Estate Club | Chapel Hill, NC

August 2019 – Present

#### Head of Recruitment

- Organized club events to identify, inform, and attract undergraduate students to club affairs
- Advertised the club in a variety of settings including large lecture halls, face-to-face with faculty and students, and to those unaffiliated with the university
- Grew average general body meeting attendance from 22 members in 2018 to 49 members in 2019

# NICHOLAS M. LINDSAY

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## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC 2022

**Master of Business Administration**, Full-Time MBA Program

- Concentration in Real Estate; Enrichment in Business Analytics; GMAT 740
- David and Randee Hartzell Real Estate Fellowship, Kenan-Flagler Fellowship - Partial Tuition

**UNIVERSITY OF VIRGINIA, McIntire School of Commerce** – Charlottesville, VA 2016

**Bachelor of Science**, Commerce

- Concentrations in Finance and Management; Track in Real Estate
- Dean's List (all semesters), Intermediate Honors (top 20% of class after 4 semesters)
- Pancakes for Parkinson's (Treasurer, 2014; Community Outreach Co-Chair, 2013)

## EXPERIENCE

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**H.I.G. CAPITAL, LBO FUND** – Miami, FL 2018-2020

**Private Equity Associate**

- Acquired new platform investment with \$700M+ revenue in transportation space, working as sole associate from initial opportunity evaluation to deal closing
- Managed flow of \$120M+ in funds between H.I.G., lenders, and other agents on closing day
- Built extensive financial models for potential investments and portfolio companies which were used to analyze stakeholder returns, set leverage covenants, and assess potential impacts of COVID
- Restructured insurance program with a team of management executives, lenders, and third parties, improving company operating flexibility and freeing \$6.5M of collateral requirements
- Refinanced platform investment in healthcare space to increase growth capacity and improve liquidity, increasing revolving line of credit by \$7.5M and extending maturity
- Analyzed investments for a global firm with over \$37B of equity capital across a range of industries, preparing financial models, due diligence memos, and committee presentations

**HARRIS WILLIAMS, INDUSTRIALS GROUP** – Richmond, VA 2016-2018

**Investment Banking Analyst**

- Closed 4 sell-side transactions exceeding \$1.3B in total value with multiple teams as sole analyst
- Managed third party advisors and quarterbacked diligence work streams in Brazil, France, and Thailand while onboarding and advising new personnel (new associate from Harris Williams and associate from client)
- Presented to groups of interested students and 30+ new hires as part of Harris Williams Recruiting Team, interviewed new hire candidates, and trained groups of 10-15 interns
- Achieved a full-time offer of employment based on performance during a 2-week boot camp program in 2015, culminating with a comprehensive presentation to a group of senior bankers

## ADDITIONAL

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- McIntire Alumni & Career Mentor - mentor 3rd-year McIntire students (2016-present)
- Languages: English (native), Spanish (basic proficiency)
- Interests: golf (summer caddy), running, deep sea fishing, college basketball, psychology
- Zeta Psi Fraternity (Philanthropy Chair, 2013-2014; Active Member, 2013-2016)

# JAVIER MADRIZ

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## EDUCATION

**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** - Chapel Hill, NC May 2022  
**Master of Business Administration**, Full-Time MBA Program

- Concentration in Real Estate; Enrichment in Business Analytics and Management Science
- Student Store Co-President; Real Estate Club Member
- UNC Kenan-Flagler Merit Fellowship – Partial Tuition

**UNIVERSITY OF NORTH CAROLINA at Chapel Hill** - Chapel Hill, NC May 2019  
**Bachelor of Science Business Administration**, Marketing and Consulting

- Study Abroad, Chinese University of Hong Kong (China)

## EXPERIENCE

**STRONGKEY** - Durham, NC 2019-2020  
*Cybersecurity startup; investors include Japanese publicly-traded company, Systema*

### Marketing Communications Specialist

- Increased subscribers 160% YoY by developing and executing automated multi-channel marketing campaigns with content curated to prospects based on their job title and industry
- Analyzed performance data and determined market trends using correlation analysis to boost campaign performance, leading to a 2.6x surge in website traffic
- Collaborated cross-functionally with Sales and Engineering to implement workflows, email automation, and curated content creation for website, driving a 423% surge in email activity and 74% more leads

**FORTUNE 100 MEDIA & ENTERTAINMENT COMPANY** - Orlando, FL 2019-2019  
*Consulting project for company's Theme Parks and Resorts division—part of Kenan-Flagler's STAR Program*  
**STAR Consultant**

- Spearheaded a multigenerational marketing strategy for a ~\$2B+ property to capture long-term cash flow growth from Millennial and Gen Z demographics, influencing leadership's strategic decisions
- Delivered recommendations on products, properties, and generational insights to senior executive board

**GLANZ** – Guatemala City, Guatemala 2017-2018  
*Medium-sized distributor of high-end cleaning and painting supplies, engaging in both B2B and B2C*  
**Internal Consultant** (Summer 2018)

- Developed and implemented semi-automated inventory models using advanced spreadsheet modeling, expected to increase revenue by 5%
- Designed a performance-based bonus system to improve employee morale and boost sales by 10%

### Digital Marketing Intern

 (Summer 2017)

- Launched e-commerce capabilities for website using Wix to diversify revenue streams
- Achieved 1st page ranking for 150+ keywords and raised website's average search position from 9.3 to 6.8 by creating and establishing a best practice SEO strategy based on available KPIs

**A DRINK FOR TOMORROW** - Chapel Hill, NC 2016-2018  
*Non-Profit at UNC's campus addressing water crisis issues in Bolivia and South Africa*  
**Co-President**

- Led and managed an executive board comprised of 10 students and a club with 50+ active members
- Oversaw grant applications, corporate outreach, and fundraisers resulting in \$11K+ in donations

## ADDITIONAL

- Native proficiency in Spanish; Fluent in French and English
- Advanced Spreadsheet Modeling

# PETER L. MCARTHUR

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## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2021  
**Master of Business Administration**, Full-Time MBA Program

- Concentration in Real Estate; UNC Kenan-Flagler Merit Fellowship

**UNIVERSITY OF NORTH CAROLINA at Chapel Hill** – Chapel Hill, NC May 2013  
**Bachelor of Business Administration**, GPA 3.69

## EXPERIENCE

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**KFBSF REAL ESTATE FUNDS** – Chapel Hill, NC September 2020 – Present  
**Fund Manager**

- Responsible for the day-to-day operations of student-run real estate private equity funds including identification and evaluation of investment opportunities, asset management, investor relations and quarterly reporting

**HQ CAPITAL REAL ESTATE, L.P.** – New York, NY Summer 2020  
**Private Equity Summer Associate**

- Conducted property-level due-diligence and prepared investment materials for Class A multifamily development opportunities across the US
- Modeled joint ventures to project general and limited partner returns based on various cases of rent growth, exit cap rates, promote structures and other scenarios
- Created an internal presentation summarizing the merits of pursuing investments in single family rentals
- Presented findings of summer project analyzing the considerations of subscription lines for funds

### Representative Transaction Experience

*\$52.5M Class-A Garden Apartment (313 Units; Atlanta, GA) – \$16.4M Equity Investment*

*\$40.9M Townhome Rental Community (172 Units; Charlotte, NC) – \$12.9M Equity Investment*

*\$45.7M Class-A Garden Apartment (300 Units; Austin, TX) – \$16.9M Equity Investment*

**CAPITALA GROUP, LLC** – Charlotte, NC 2016 – 2019  
**Underwriting Associate**

- Structured and executed over \$350.0M in direct lending and private equity financings for middle market businesses with \$5.0-20.0M in EBITDA
- Built financial models to determine profitability, cash flow and returns for senior debt, mezzanine and equity investments
- Played integral role in \$1.0B fundraising mandate through preparation of marketing materials and collection of portfolio data for potential limited partners

**REGIONS SECURITIES, LLC** – Charlotte, NC 2013 – 2016  
**Investment Banking Analyst**

- Assisted in syndicating and underwriting over \$1.5B in debt commitments as the group's first analyst
- Prepared credit memoranda for credit underwritings to identify risks, propose mitigants and discuss optimal capital structures among other investment considerations

## ADDITIONAL

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**Skills:** Highly proficient in Excel, *Built model templates for Capitala Group and Regions Securities*

**Activities:** Kenan-Flagler Real Estate Club, *Finance & Operations Liaison*; MBA Student Association, *Co-VP of Social*; Junior Achievement, *Classroom Volunteer & JA in a Day*; The 704 Project, *Battle of the Brews*

**Hobbies & Interests:** Carolina Panthers, Golf, Hunting, Racquetball, Running and Sailing

# Alexander James Nations

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## EDUCATION

**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** — Chapel Hill, NC Class of 2022

*Bachelor of Science, Business Administration* GPA: 3.69

- Dean's List: Fall 2018, Spring 2019, and Fall 2019
- Edmund B. Ross III BSBA Endowment Scholarship, Excel@Carolina Summer Study

## RELEVANT EXPERIENCE

**SIMPSON COMMERCIAL REAL ESTATE** – Charlotte, NC June 2019 – August 2019

*Boutique Real Estate Brokerage Firm*

### Marketing Intern

- Utilized analytical skills completing project pro-formas
- Participated in weekly Owner, Architect, Contractor (OAC) meetings
- Applied Photoshop skills to create multiple marketing flyers for properties worth ~\$4M in total value
- Developed 14-page proposal for a property and successfully obtained the listing worth ~\$2.8M
- Researched permit status for 320,000 SF multi-use site

**GRANZOW INC.** – Charlotte, NC April 2018 – August 2018

*Global Industrial Manufacturing Parts Distributor*

### Sales Intern

- Monitored accounts receivable and initiated client contact on outstanding invoices
- Managed a portfolio of over 100 current clients and performed new client credit analysis
- Enhanced each customer's experience by providing excellent service
- Oversaw and optimized internal report distribution
- Recommended improvements for warehouse reorganization

## LEADERSHIP AND COMMUNITY INVOLVEMENT

**YOUNG LIFE, Volunteer Leader** – Chapel Hill, NC January 2019 – Present

- Developed mentorship relationships and led with integrity
- Facilitated communication among team members to plan events
- Coordinated club activities and conducted weekly meetings for local high school students

**CAROLINA WAY CAMP, Sophomore Staff** – Chapel Hill, NC August 2019

- Built relationships with incoming first-year UNC students
- Encouraged a positive camper experience by serving the needs of over 140 campers
- Used personal experiences to guide first-years during their transition into college

**PROJECT 658, Volunteer** – Charlotte, NC January 2017 – May 2017

- Tutored over 40 refugee children in after-school program

## ADDITIONAL INFORMATION

**LICENSURE** September 2019 - Present

Real Estate Broker License, North Carolina Real Estate Commission

### COMPUTER SOFTWARE

- Proficient in Adobe Photoshop and Microsoft Office Suite
- Trained on *LandVision* – Real Estate Analysis and Mapping Software

### ADDITIONAL SKILLS AND EXPERIENCE

- Eastdil Secured Virtual RE Finance Training Program – Real Estate Finance and Excel Fundamentals July 2020
- Real Estate Excel Modeling Workshop February 2020
- UNC Real Estate Club Member
- Bloomberg Certification: BMC's Core Concepts
- Captain of State Championship High School Football Team; All-Conference and All-State Football Honors

## EDUCATION

**University of North Carolina at Chapel Hill** – Chapel Hill, NC

May 2022

*Business Administration Major; Entrepreneurship and Urban Studies and Planning Minor*

GPA 3.503

### Honors and Awards

Wood-Cole Scholar (Four-Year Merit Scholarship)

Dean's List

Honors Carolina

**Global Experience** – Oracabessa, Jamaica

August 2019

*Business and Community Development Volunteer*

- Executed a business model for a soap-producing entrepreneur, securing \$10K of government funding
- Developed a low-cost reproducible labeling technique reducing production costs by 25%
- Constructed and implemented a cost and revenue schedule, leading to a 17% reduction of costs

## EXPERIENCE

**Highwoods Properties** – Raleigh, NC

July 2020 – August 2020

*Summer Rotational Associate*

- Developed a tool utilizing future NOI growth which conducts prospect research to understand the company's market position and any underlying issues during the COVID-19 pandemic
- Conducted financial analysis and development of capitalization strategies for investment pursuits in new markets

**Greystar Real Estate Partners** – Chapel Hill, NC

January 2020 – May 2020

*Construction Intern*

- Executed and analyzed various financial and administrative reports and developed specific information that leverages internal systems and performance data
- Produced daily entries into Procore including daily logs, consultant reports, punch lists, photos, RFIs and submittals

**Trammell Crow Residential** – Atlanta, GA

May 2019 - July 2019

*Development Intern*

- Performed market and demographic research for creation of fundraising materials including equity pitch books and investment committee memos
- Examined viability of an urban affordable high-rise; ran scenario analysis to maximize yield by utilizing tax abatements, reducing fees, and altering unit mix between different AMI levels and market rate units
- Created pro forma financial projections for new developments, including market information, operating expense data, and hard and soft costs
- Produced a full under-write and pitch deck for a deal, resulting in securing a contract for the development project
- Conducted due diligence for new development businesses, including market analysis, financial feasibility research, and preliminary due diligence, generating leads for 3 new deals
- Developed a private equity-focused investment pitch deck for a property, resulting in a buy-in from a capital partner
- Underwrote over \$300M in market and workforce multi-family pursuits in Atlanta and Charlotte MSA

## LEADERSHIP AND COMMUNITY INVOLVEMENT

**Real Estate Diversity Internship (REDI) Program** – Chapel Hill, NC

January 2019 - Present

*Ambassador, Leonard W. Wood Center for Real Estate Studies*

- Establish connections with 6 clubs to market REDI with a result of a 20% rise in applications over a semester
- Design PowerPoint presentations for underclassmen outlining my experience and information about the REDI program

**Carolina Women in Business** – Chapel Hill, NC

February 2019 - Present

*Alumni Connections Committee/Member*

- Utilize future plan surveys, internship connections, and LinkedIn to foster 20 new partnerships with alumni
- Planned and executed an end-of-year banquet involving a speaker, dinner, and networking with alumni/professors

## ADDITIONAL INFORMATION

- **Technical Skills:** AxioMetrics, CoStar, Timberline, Procore, Bluebeam, REIS, Yardi, HTML5, Green Street Advisors
- **Interests:** Backpacking, Cooking, Mentorship, Travel

# TAYLOR SMITH

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## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC      May 2022

**Master of Business Administration**, Full-Time MBA Program

- Concentration in Corporate Finance and Real Estate; GMAT 710
- Graduate and Professional Student Federation Senator
- Project Destined Mentor

**UNIVERSITY OF GEORGIA** – Athens, GA

December 2013

**Bachelor of Arts**, Economics

## EXPERIENCE

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**LAMAR SMITH HOMES** – Savannah, GA      2019-2020

*Single Family Residential Developer and Homebuilder*

**Development Associate**

- Added \$4.5M in revenue annually by leading efforts to diversify real estate portfolio by expanding into rental markets and creating comparative market analysis to develop product pricing and strategies
- Oversaw design and development of an affordable housing project in a federal opportunity zone totaling 150 units with annual revenues to exceed \$2.5M
- Developed an on-boarding curriculum used with all new home sales consultants specifically focused on training in residential mortgage finance

**ASHTON WOODS HOMES** – Atlanta, GA

2017-2019

*Single Family Residential Developer and Homebuilder*

**Sales Consultant**

- Recognized as Sales Person of the Year for 2018 and closed 35 units, which generated over \$7.75M in revenue, the highest across 5 divisions (Atlanta, Arizona, Dallas, Austin, & Florida)
- Mastered residential mortgage finance to guide buyers through mortgage qualification process; worked with clients to understand debt-to-income ratios, identify mortgage options/financing opportunities, and set financial goals to achieve home ownership
- Acknowledged as highest producing community across Greater Atlanta Metropolitan Area for Q2 2018 by National Association of Home Builders in highest dollar volume and units sold

**DOVETAIL DEVELOPMENT** – Athens, GA

2014-2017

*Luxury Student Housing Developer*

**Sales and Property Manager**

- Interviewed, hired, and led teams of 30+ college student leasing agents to promote, sell, and manage luxury student housing developments throughout the Southeast
- Oversaw management team at The Woodlands of Baton Rouge in preparation for sale of property to investors helping Dovetail Companies rank in top 10 sellers of student housing with \$467M in sales revenue

## ADDITIONAL

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- **Certifications:** Licensed Georgia Real Estate Salesperson
- **Interests:** Condominium renovation project featured in Apartmenttherapy.com, home renovation project to be featured in Southern Living Magazine, Bluegrass Guitar, Piano



# Ricky Spinale

## EDUCATION

**UNC Kenan-Flagler Undergraduate Business School** – Chapel Hill, NC

May 2022

*Business Administration; Focus in Real Estate*

- GPA 3.69
- Major GPA 4.0
- Spring 2019, Fall 2019, Spring 2020 Dean's List

## Honors and Awards

- Navy ROTC Three-year Scholarship August 2019
- 2x Hayden B. Renwick Academic Achievement Award April 2019/2020
- International Baccalaureate Diploma Recipient June 2018

## EXPERIENCE

**Clinton Rubin LLC** – Trevese, PA

May 2019 – Present

*Business Development Specialist: Clinton Rubin LLC specializes in Infor implementation and was founded by former Big Four company partners*

- Consolidated company resources and past projects to produce a deliverable for possible clients
- Led a social media campaign that resulted in a 1440% increase in LinkedIn followers
- Build relationships with integral assets of companies that need assistance with Infor implementation

**Acquest Development LLC** – Buffalo, NY

Summer 2020

*Summer Intern: Commercial real estate development company that specializes in government contracts*

- Canceled due to COVID-19

**Ruocco's on 9** – Howell and Manalapan, NJ

July 2017 – August 2019

*Waiter: Family-owned Italian restaurant that recently opened a new location in Manalapan, NJ*

- Supervised the training and recruitment of new employees
- Implemented restaurant procedures and regulations to aid in the grand opening of the new location
- Coordinated inventory analysis of both restaurant locations

## LEADERSHIP AND COMMUNITY INVOLVEMENT

**Make-A-Wish UNC** – Chapel Hill, NC

August 2019 – Present

*Wish Granter/Spring Wish Ball Coordinator*

- Establish connections with recipients and families to pass along wishes to foundation coordinators
- Update recipients on the status of their wish through consistent contact and visits
- Unveil approval of wishes through planned celebrations with friends and family

**Alpha Tau Chapter of Sigma Chi International Fraternity** – Chapel Hill, NC

September 2018 – Present

*Member*

- Network through different social media platforms and individuals to recruit possible members
- Coached various sorority teams in 2018/2019 Sigma Chi Derby Days that raised \$9,400 for the Note-in-Pocket Charity

**UNC Naval ROTC** – Chapel Hill, NC

December 2018 – October 2019

*Midshipmen*

- Collaborated with Commanding Officers to integrate incoming midshipmen into the program
- Planned comradery building events for the Battalion to boost morale of midshipmen
- Attended interest fairs and spoke on behalf of the program to recruit possible candidates

# WALKER J. TREVEY

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## EDUCATION

**University of North Carolina at Chapel Hill** – Chapel Hill, NC  
*Kenan-Flagler Undergraduate Business Program; Urban Planning Minor*  
GPA 3.64

May 2022

### Honors and Awards

- UNC Dean's List: Since Spring 2019
- Cum Laude Society: 2018

### Real Estate Licensure – Online

March 2020 – Present

*Superior School of Real Estate*

- Completed the 75 hour provisional brokerage course and one of three 30 hour post licensing courses
- Passed the North Carolina and National exams first attempt on July 2<sup>nd</sup>, 2020 to become a provisional RE broker

### Global Experience – London, United Kingdom

June 2019 – July 2019

*Study Abroad at London School of Economics*

- Studied HR management and Social Innovation/Entrepreneurship on a global scale
- Expanded knowledge on foreign policy through active discussions in an international classroom

## EXPERIENCE

### Brown Investment Properties – Greensboro, NC

June 2020 – July 2020

*Intern*

- Performed comparative market analyses to estimate value of various retail, industrial, and mixed use properties
- Completed Costar training courses, then used skills to gather data and compile suitable listed properties for buyer clients
- Investigated multi-family complexes in given markets to determine feasible rent rates of early stage developments
- Generated write-ups and spreadsheets to summarize field studies and provide proformas for new developments
- Contacted 300+ property owners to update brokerage files on the status of the property (availability, brokerage fees, etc.)

### SlipSure – Chapel Hill, NC

February 2019 – June 2019

*Thinkternship Program / Sales and Marketing Intern*

- Cold Called 250 potential clients proposing an unconventional service and closing a total of 5 sales
- Offered improvements in company sales tactics through analysis of consumer data
- Utilized the Hubspot CRM and MailChimp to manage client accounts and revise digital marketing platforms
- Inspected the functionality of the SlipSure app and reported bugs in the software using *Trello*
- Optimized data efficiency by auditing all contact lists, creating more detailed and navigable spreadsheets

## LEADERSHIP AND COMMUNITY INVOLVEMENT

### UNC Real Estate Club – Chapel Hill, NC

February 2019 – Present

*Member*

- Developed a high level skill set in real estate Excel modeling through analyzation of multiple value added cases
- Completed the real estate boot camp, learning key concepts regarding valuation, investment strategies, and market trends
- Engaging in various information sessions to establish a broad perspective of the world of real estate

### Dozen Doughnut Dash – Chapel Hill, NC

August 2018 – Present

*Co-Director of Business Partnerships*

- Raised \$200 individually through solicitation of potential donors in the effort to reach our goal of \$2000 for 2019
- Helped set up and organize two annual races raising over \$3000 total for UNC Lineberger Cancer Center

### UNC Reynolds Investment Fund – Chapel Hill, NC

September 2020 – Present

*Analyst*

- Collaborating on a team of 22 undergraduates to manage 600K+ of long-only equity and fixed income investments
- Pitching new positions in both the Real Estate and Energy sectors as well as evaluating pitches from other sectors.

## ADDITIONAL INFORMATION

- Head Recruitment Chair for Beta Theta Pi; budgeted \$30k for 2019 and organized the transition to virtual rush for 2020
- Member of the UNC Finance Society; learning accounting and technicals of investment banking through boot camp
- Member of the UNC MoneyThink Club; teaching underprivileged students financial literacy at Phoenix Academy

# MARCOS A. VIDAL

Marcos\_Vidal@kenan-flagler.unc.edu  
(305)297-1223  
linkedin.com/in/vidalmarcos

## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** – Chapel Hill, NC May 2021  
**Master of Business Administration**, Full-Time MBA Program

- Concentrations in Real Estate, and Entrepreneurship
- Kenan-Flagler and Horey Family MBA Fellowship – Full tuition

**STANFORD UNIVERSITY** – Stanford, CA June 2014  
**Master of Science**, Civil and Environmental Engineering, Sustainable Design and Construction track

**STANFORD UNIVERSITY** – Stanford, CA June 2013  
**Bachelor of Science**, Civil Engineering, Structures and Construction track

## EXPERIENCE

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**GREYSTAR** – Charleston, SC Summer 2020

*Greystar is the global leader in rental housing, owning, operating and developing housing across the globe*

### Summer Associate

- Created a business plan, financial projections, tax incentive probability, and feasibility of purchasing and operating a modular factory to support East Coast development projects; internship was extended
- Completed market research presentation for development project in Santiago, Chile, and template playbook for Spain projects
- Presented “go/no go” decisions for two ground-up development projects in downtown Philadelphia, including full proforma, qualitative and quantitative evaluation for recommendations

**PRIMESTOR DEVELOPMENT, LLC** – Los Angeles, CA 2017-2019

*Primestor develops, manages, leases, and constructs urban retail projects in Greater Los Angeles*

### Project Manager

- Managed \$21M+ construction of 155k sf retail center, including design/engineering consultants and a general contractor; negotiated lease Work Letters with tenants and delivered to property management
- Obtained entitlements and construction permits for new projects, generating value for investors by taking project from idea to permittable project and through construction to tenant’s rent commencement
- Led teams of 4 design consultants and contractors from preconstruction through closeout of multiple capital improvement projects; bid projects, created bid spreads, negotiated scope, and executed contracts

**TOLL BROTHERS, INC.** – San Francisco Bay Area, CA 2014-2017

*NYSE: TOL designs, builds, markets, and arranges financing for luxury residential communities*

### Project Manager (2016-2017)

- Managed a \$100M, high density, 88-unit, residential development and public park, including land, permits, construction, sales, marketing, accounting, profit/loss, and quality control
- Led a team of sales, construction, and administrative personnel comprising 8 direct reports, exceeding sales and closing projections for fiscal year; met budget and financial commitments

### Assistant Project Manager (2014-2016)

- Completed preconstruction for 3 model homes and start-up of sales center for new community; read/redlined architectural, structural, mechanical plans; value engineered plan sets with consultants
- Built the sales option catalog with 500+ options, including builder costs and sales pricing and created an efficient tool with Excel that streamlined sales process and sub-contractor pricing audit

## ADDITIONAL

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- Self-developed raw land in Los Angeles: due diligence, acquisition, entitlements, and disposition
- Lived in six countries, Eagle Scout, experienced outdoorsman, and tenor saxophone player
- Native proficiency in English and Spanish; fluent proficiency in Portuguese

# PATIENCE WALL

*Patience\_Wall@kenan-flagler.unc.edu*  
(910) 334-1857  
*linkedin.com/in/patiencewall/*

## EDUCATION

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**UNIVERSITY OF NORTH CAROLINA, Kenan-Flagler Business School** — Chapel Hill May 2022

**Master of Business Administration**, Full-time MBA Program, concentration in Real Estate

- Dean's Fellow; Bank of America Fellowship— Full Tuition and fees; Consortium for Graduate Studies in Management Fellow — Full Tuition and fees; Forté Fellow —Full Tuition and fees;

**Master of City and Regional Planning**, concentration in Economic Development

- Led student team creating a market study, design, parcel maps, financial modeling, and pro forma analysis for a local municipality redevelopment plan with Development Finance Institute
- Performed industry and job analysis on an economic report for NC Department of Commerce

**DUKE UNIVERSITY, Trinity College of Arts and Sciences** — Durham NC

May 2015

**Bachelor of Arts (A.B.)**, Public Policy Studies, GPA 3.68

## EXPERIENCE

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**NORTH CAROLINA OFFICE OF STATE BUDGET & MANAGEMENT** — Raleigh, NC 2020

**Strategic Partnerships Graduate Intern for Real Estate Development Partner**

- Led data analysis and planning on 3 rural affordable housing and social service real estate projects
- Designed scoring framework to assess market, demographic, and site characteristics indicating real estate supply and demand trends across 20 properties in corporation's portfolio
- Managed workplan, presentations, regular updates, and project management for 12 weeks
- Researched and presented city and regional policies and initiatives to corporation for identifying potential partners in proposed public-private partnerships

**DUKE UNIVERSITY SANFORD SCHOOL OF PUBLIC POLICY**— Durham, NC

2017-2019

**Engagement Coordinator with Color of Education Initiative** (2019)

- Co-founded Color of Education partnership obtaining buy-in from leading experts and institutional commitment from partners to compose vision for improving racial equity in North Carolina schools

**Director of State and Local Policy Engagement** (2018-2019)

- Initiated and maintained relationships with foundations, government offices, and community organizations to identify opportunities to collaborate on policy implementation, reports, and analysis
- Oversaw planning and project management for task forces and meetings with decision-makers on delivering long-term policy and research recommendations to state agencies and academic institutions
- Designed and conducted policy workshops and presentations for 125+ faculty, staff, and students
- Executed long-term programming and financial metrics to support mission and attain budgetary goals including securing sponsorship to cover \$45K+ in expenses
- Co-chaired Staff Advancement Committee leading discussions in designing recognition/accountability procedures for 170+ staff members

**Policy Engagement Coordinator** (2017-2018)

- Led engagement and strategic planning on a university start-up to increase engagement between researchers, practitioners, and policy officials on top policy issues including the opioid crisis

**PUBLIC POLICY POLLING** — Raleigh, NC

2016

**Polling Analyst**

- Administered 200+ national public opinion surveys to help firm reach its highest grossing year
- Produced data and reports for sharing with national media including The Washington Post and MSNBC

## ADDITIONAL

- 
- Software: Esri BAO, IMPLAN, ArcGIS, STATA, Adobe Creative Suite, Qualtrics, SAP, and CSS
  - Language: Spanish: Conversational
  - Interests: social equity, hiking, learning new crafts, and nature documentaries

# Alfred E. Ward

alphared@live.unc.edu  
(336) 419-8502

## EDUCATION

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**University of North Carolina at Chapel Hill** – Chapel Hill, NC

May 2021

*RECiPE Major - IDST: Real Estate, City Planning, and Economics; Minor in Entrepreneurship*

## Honors and Awards

- I was selected to pitch my startup in front of the UNC Shuford Program in Entrepreneurship's board of investors and I received an investment offer.

## EXPERIENCE

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**J's Delectable Delights** – High Point, NC

August 2014 - May 2015

*Co-Owner/Head of Sales [Bakery business startup in High School specializing in cake pops.]*

- Increased sales from 20 cake pops per week to 20 cake pops per day.
- Within 5 months, I increased the customer base from about 30 students to over 300 students and teachers.
- Hired and managed a team of 7-10 salespeople.
- Managed all of the financials of the business as it made close to \$3000 in revenue in one semester.
- Managed an inventory of 5 different products with a supply of about 200 units of perishable goods.

**MoJo Vending** – Chapel Hill, NC

November 2018 - Present

*Startup Founder*

- Identified an opportunity for innovation on UNC's campus.
- Pitched my idea repeatedly and earned the support of over 15 people in positions of power at UNC.
- To prove demand for the idea, I raised money to finance, design, and distribute about 1000 flyers for a survey to all 32 residence halls at UNC.
- Presented a 15-minute presentation with about 20 minutes of questioning in front of a board room of 4 UNC department executives including: The Executive Director of Housing, Assistant Director of Housing, the Head of Vending, and the Head of all Auxiliary Services at UNC.
- Created the financial model, business plan, and business model canvas for the startup.
- Earned an official letter of support from the President of UNC's Resident Housing Association and the entire executive board.

**SpeakEZ** – Chapel Hill, NC

August 2019 - Present

*Startup Founder*

- Identified an opportunity for innovation in UNC's classrooms
- Effectively pitched my idea to 1 person in power and was shortly after chosen to pitch in front of about 20 of the top investors for the UNC Shuford Program in Entrepreneurship.
- Received an investment offer from a member of the board.
- In a separate meeting, I pitched, earned the support of, and partnered with the leading expert at UNC.
- I'm currently building the startup from idea to launch with my team and the support of the Shuford Program.

**NC IDEA** – Chapel Hill, NC

May 2020 – August 2020

*Summer Intern*

- NC IDEA is a private foundation with a mission to maximize the economic potential of the people of North Carolina by supporting the formation and fruition of high-growth entrepreneurial endeavors in the state.
- During my internship, I worked in the NC IDEA LABS Program offering support to about 20 startups and their founders.
- I also worked to complete about 15 private consulting projects for startups linked to NC IDEA through their Intern/Fellow Project Assistance Program.
- I also worked to support NC IDEA on about 5 internal consulting projects during my time.
- Consulting projects included tasks such as market research, customer empathy interviews, whitepaper development, product development, supply chain development, growth strategy analysis, etc.

## **LEADERSHIP AND COMMUNITY INVOLVEMENT**

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**National Technical Honor Society** – High Point, NC

January 2015 - May 2015

*Community Service Volunteer*

Helped clean up local communities in my free time

Mentored and gave advice to elementary school kids in my community

**Impact Investing Cub** – Chapel Hill, NC

January 2019 - Present

**UNC Real Estate Club** – Chapel Hill, NC

August 2019 - Present



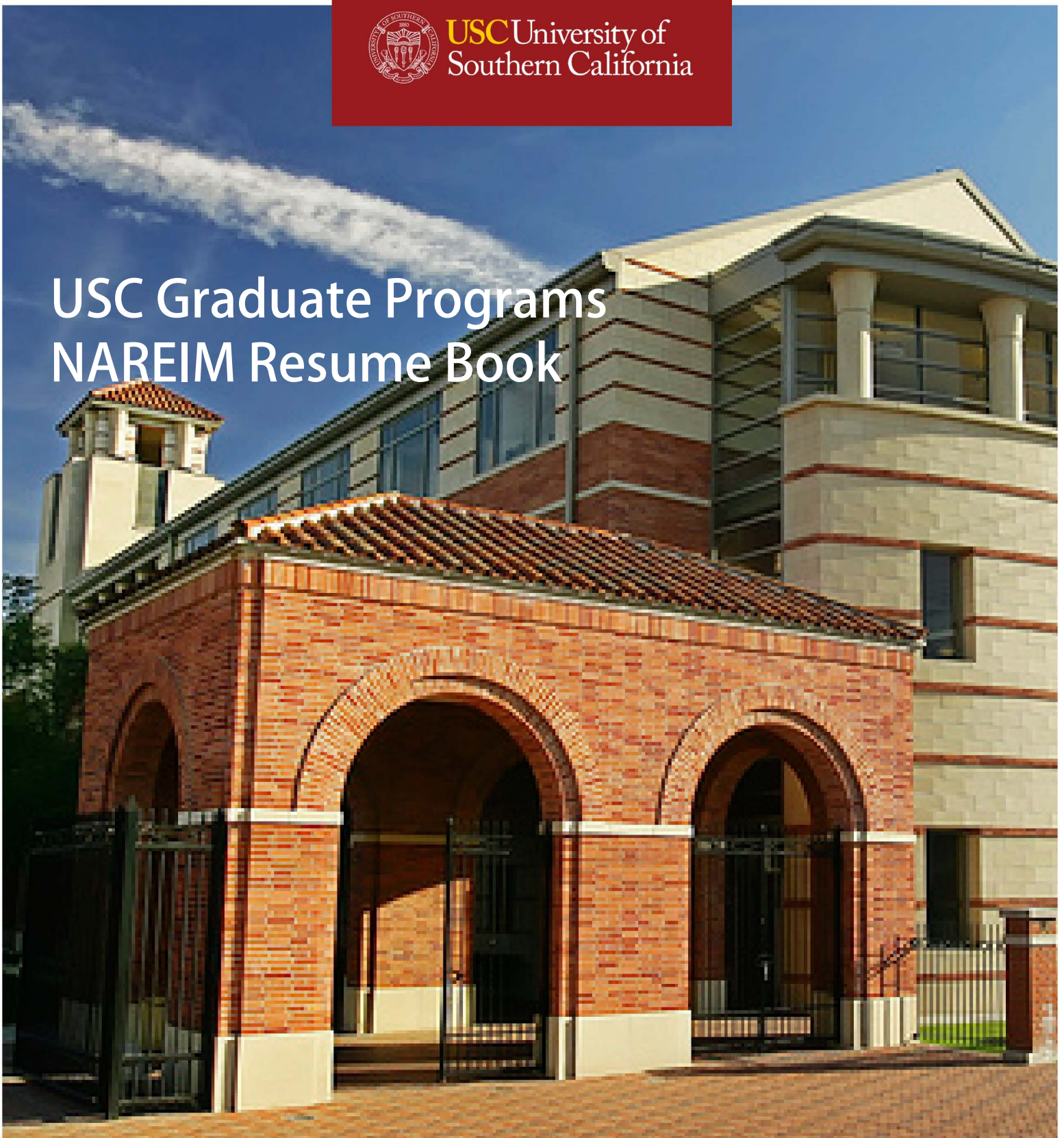
# **University of Southern California, Marshall School of Business**





USC University of  
Southern California

# USC Graduate Programs NAREIM Resume Book



USC  
Marshall  
School of Business



# Adam C. Karaczynski

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## EDUCATION

**University of Southern California** Los Angeles, California

*Master of Business Administration*, Marshall School of Business May 2021

*Dollinger Master of Real Estate Development*, Sol Price School of Public Policy May 2021

- Cumulative GPA: 3.79
- Case Competition: 17th Annual National Real Estate Challenge at University of Texas at Austin (McCombs)
- Leadership: President of Graduate Real Estate Association (GREA)

**University of Michigan** Ann Arbor, Michigan

*Bachelor of Business Administration*, Stephen M. Ross School of Business May 2013

- Membership: Student Manager for Men's Basketball Team (2013 NCAA Runner-up)

## EXPERIENCE

**OUE Limited** Los Angeles, California

*Real Estate Analyst Part-Time Intern* February 2020 – April 2020

OUE is a Singaporean-based public real estate firm with approx. \$7 billion USD in AUM (former owner of US Bank Tower in DTLA). Assisted management with underwriting of potential new office and hotel acquisitions in US Gateway Markets.

- Developed and updated Excel & Argus financial models for potential office and hotel acquisitions with asset values between \$100MM and \$400MM
- Performed market analysis, property due diligence and wrote investment memorandums for senior investment committee

**JLL** New York, New York

*Senior Analyst for United States Postal Service (USPS) Account, Public Institutions* 2017 – 2019

Public Institutions services the firm's government and higher education clients. Performed transaction management across various transaction types (leases, acquisitions, dispositions) for USPS's 37,000 asset portfolio.

- Successfully leased 1,000,000+ SF of new retail / industrial space for USPS across the country; responsible for creating market surveys, touring locations with USPS, negotiating lease terms and drafting lease agreements
- Implemented national subleasing strategy for vacant space (360 locations, ~1.1M SF) across USPS's 7,000+ owned asset portfolio; executed 11 transactions in less than 1 year
- Calculated 17 property valuations totaling \$25M via market comparable based approach

*Development Advisory Analyst on East Coast Market Team, Public Institutions* 2016 – 2017

Provided public sectors clients with comprehensive real estate advisory services, including market/economic analysis; financial feasibility analysis; highest and best use studies; planning and land use analysis; and public-private partnerships.

- Performed Tax Increment Financing (TIF) feasibility to World Bank for Medellin Innovation District (~1.4M SF, mixed-use development in Medellin, Colombia), progressing Latin America's first TIF development project
- Modeled financial impacts of commercial redevelopment and infill development opportunities for Port of San Diego's 2050 Master Plan Update; projected ~\$183M net increase of revenue for agency by 2050
- Negotiated lease agreements with 3 retail and 3 transportation tenants for Springfield (MA) Redevelopment Authority during rehabilitation of Historic Springfield Union Station
- Created model to calculate station area development projections for 10 stations along proposed California High Speed Rail project; advanced feasibility analysis of monetizing property tax increases as source of project funding

**J.P. Morgan Chase & Company** New York, New York

*Associate – Corporate & Investment Bank (CIB) Oversight and Control* 2013 – 2016

Mitigated operational risk for the global leader in the financial services industry by ensuring business lines were compliant with operational risk standards and demands of regulatory bodies.

- Conducted root cause analysis of CIB's operational Errors (economic losses), leading to thematic reviews and development of loss prevention processes for business lines
- Chaired 40-person committee and established CIB's Global Funds Transfer Standard

## SKILLS & INTERESTS

- *Training / Skills*: Argus Enterprise Certified (EKP-0157-7484-4273-940)
- *Interests*: Tennis (4/4.5 rating), golf (recently broke 90), surfing (favorite wave: Point Dume) and Jackson Hole skier; Intl. travel (18 countries, 60 cities)

# TAYLOR S. FERGUSON

Los Angeles, CA • tsfergus@usc.edu • 804-586-5861 • www.linkedin.com/in/taylor-ferguson

## EDUCATION

**University of Southern California, Marshall School of Business** – Los Angeles, CA

**May 2022**

*Master of Business Administration/Master of Real Estate Development*

- Relevant Coursework: Corporate Finance, Venture Capital and Private Equity, Investment Portfolio Management
- VP of Strategic Partnerships, Graduate Real Estate Association (2021)

**James Madison University** – Harrisonburg, VA

**May 2012**

*Bachelor of Science, Healthcare Administration; Minor: Business*

- Honors: Dean's List; George C. Marshall Leadership Award (Top 1% of Army Cadets in the Nation)
- Graduated 1 of 104 in JMU's ROTC Program; Commander - Ranger Detachment; President - Alpha Tau Omega Fraternity

## EXPERIENCE

**Goldman Sachs** – Virtual

**Nov 2020**

*Veterans Integration Program Apprenticeship*

- Selected to participate in Goldman Sachs' intensive week-long apprenticeship followed by an extensive virtual curriculum focused on an introduction to financial services, professional development, and improving technical financial skills in preparation for a career in financial services

**CBRE** – Los Angeles, CA

**2019-2020**

*Associate Real Estate Manager*

- Managed 650,000+ Square Feet in Creative Office and Industrial space and 50+ support staff and vendors
- Organized the first business development team for Property Management in Greater Los Angeles which prospected and created a pipeline of clients with potential revenues of over \$25 Million
- Supported financial analysis, underwriting, and budgeting for over \$300 Million in assets under management to forecast and control ROI for capital markets team

**U.S. Army** – Fort Hood, TX / Syria / Kuwait / Fort Bragg, NC

**2012 – 2019**

*Assistant Director Of Operations 700+ Person Org (2018 – 2019)*

- Coordinated and controlled the movement of 320 pieces of equipment valued at \$230 Million over 600 miles and accounted for manning, maintenance, recovery, and budgetary requirements; saved the Army \$100,000+ in fuel and overtime contractor costs
- Developed and implemented new officer integration program that increased preparedness for 18 new officers and reduced onboarding process from one month to one week while saving the organization \$32,000

*Global Expansion Strategy Manager (Detachment Commander) (2017 – 2018)*

- Led detachment of 105 people and \$16 Million of equipment from Kuwait to Syria as part of international task force and established the deconfliction zone between the U.S. and Syria along the Jordanian border
- Managed and resourced the deployment of 150 people and \$20 Million of equipment as part of the U.S. quick reaction force in order to assist in the defeat of ISIS in Raqqa

*Senior Project Manager (Scout Platoon Leader) (2014 – 2017)*

- Created digital system that projected the exact location where 500 people and 30 pieces of equipment would land after being dropped by parachute; reduced assembly time by 30% and increased combat effectiveness
- Planned and executed 35 airborne parachute operations consisting of 200 aircraft and over 10,000 people ensuring global deployment in 18 hours, exceeding the Army's standard of 96 hours while meeting the Commander's intent

*Associate Project Manager (Rifle Platoon Leader) (2012 – 2014)*

- Identified inefficiencies in information sharing for a 715-person organization; developed new processes and implemented a technical solution allowing staff to leverage prior plans and to expedite future planning

## SKILLS & INTERESTS

- Accreditations/Certifications: Licensed Real Estate Sales Agent (CA), U.S. Army Ranger School
- Volunteer: Los Angeles Small Business Consulting and Service 2 School Coach - Veteran transition program
- Memorable Life Moment: Parachuted into Normandy, France for 72nd reenactment of WWII invasion

# Tyson Bryan

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## EDUCATION

**University of Southern California, Marshall School of Business** – Los Angeles, CA **May 2022**

*Master of Business Administration (STEM), Concentration in Commercial Real Estate Finance*

- Leadership: *AVP– Strategic Partnerships*, Graduate Real Estate Association
- Professional Affiliations: ULI – Orange County, Inland Empire; NAIOP – SoCal; and CREFC
- Case Competition: Participant in the 2020 UT Austin National Real Estate Challenge
- Extracurricular Studies: Commercial Real Estate Financial Modeling program through Adventures in CRE

**Brigham Young University, Marriott School of Management** – Provo, UT **April 2014**

*Bachelor of Science in Business Management, Corporate Finance Emphasis; GPA: 3.5/4.0*

- Leadership: *President*, BYU Finance Society – helped place 10+ interns by organizing first Arizona recruiting trip
- Achievements: Global Management Certificate recipient, Asia Business Study Abroad participant (Spring 2011); 1<sup>st</sup> Place, Business Language Case Competition (2013) – Spanish
- Service: Volunteer mission in Mexico City, Mexico for The Church of Jesus Christ of Latter-day Saints (2008-2009)

## EXPERIENCE

**Goldman Sachs** – New York, NY **2016 – 2020**

*Investment Banking Associate, Financial Institutions Group (2017 – 2020)*

*Investment Banking Analyst, Financial Institutions Group (2016 – 2017)*

### Select M&A Transaction Experience

- Buy-side financial advisory for a SPAC in the contemplated acquisition of various tech-enabled lenders
- Sell-side financial advisory for **Scotiabank** in the sale of its Latin American pension and insurance operations
  - 51% ownership stake in Colombian operations sold to AFP Habitat; terms undisclosed, announced August 2019
  - Dominican Republic operations sold to Grupo Rizek; terms undisclosed, announced December 2018
- Sell-side financial advisory for **Old Mutual** in the sale of its Latin American franchise (pension, insurance, and asset management) to CMIG International; terms undisclosed, announced March 2018
- Sell-side financial advisory for **Sura Asset Management** in the sale of its Chilean annuities business to Bicecorp; \$232mm, announced March 2018

### Select Residential Real Estate Sector Experience (tech-enabled mortgage platforms, originators, servicers, and REITs)

- **COVID-19** related analysis: Buy-side M&A, burn down book value, and rescue finance analysis
- Additional analysis: DCF/SOTP valuation; capital structure optimization; rating agency presentations; financing committee memos; asset/industry benchmarking and regression; and REIT formation considerations incl. modeling
- Convertible issuances: **CIM** – \$325mm, April 2020; and **PMT** – \$200mm, November 2019
- Follow-on equity issuances: **ARR** – \$119mm, June 2017; and **AGNC** – \$507mm, May 2017
- Preferred equity issuance: **MFA** – \$275mm, February 2020

**Goldman Sachs** – Salt Lake City, UT **2014 – 2016**

*Equity Research Analyst, Latin American Financial Institutions Research*

- Assisted in publication of written research reports including buy/sell/hold calls and analysis for ad-hoc client requests for a coverage universe of 25 stocks (banks, insurance underwriters and brokers, market structure and a merchant acquirer)
- Built various company specific and benchmarking models with detailed projections, to drive DDM/DCF valuation
- Maintained country specific credit and financial system databases utilizing various country regulator disclosed data

**U.S. Department of the Treasury** – Washington, D.C. **Spring 2014**

*Economics Research Intern, Office of the Western Hemisphere (Office of International Affairs)*

- Built an automated macroeconomic model to produce 4 daily reports outlining western hemisphere market updates, highlighting LatAm credit, CDS, equity markets and macro metrics through Bloomberg and Haver data
- Assisted in analysis and reporting on EM countries with heavily depreciated currencies by forecasting FX reserves, summarizing debt schedules, analyzing bonds and reviewing potential actions by central banks and fiscal entities

## SKILLS & INTERESTS

- Service Involvement: Early morning *Seminary Teacher* for the Church of Jesus Christ of Latter-day Saints
- Interests: All things motorcycles, open-water diving (PADI certified), and spending time with my wife and daughters

# CLAYTON J. WILSON

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## EDUCATION

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**University of Southern California, Marshall School of Business** – Los Angeles, CA

**April 2022**

*Master of Business Administration (STEM)*

- Concentration in Finance & Real Estate Development
- Exp Graduation: Spring 2022

**University of San Diego** – San Diego, CA

**December 2016**

*Bachelor of Business Administration*

- Majored in Finance, Magna Cum Laude, 3.73 GPA
- Honors: Deans List, First Honors

## EXPERIENCE

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**Qualcomm** – San Diego, CA

**2020 – 2020**

*Consultant, Finance*

Qualcomm Automotive Strategy and FP&A - financial analysis & collaboration with Automotive program and product teams (Connectivity/Infotainment/Telematics)

- Developed senior management messaging & materials for earnings calls & press releases
- Lead Automotive regional pricing & aided in transition of responsibilities to onboarding team member
- Collaborated with group director on all Automotive Business Unit strategy items (Strat Plan/Product Councils/etc)

**J Street Hospitality** – San Diego, CA

**2020 – 2020**

*Development Analyst*

Development Team - responsible for acquisition & development analysis and market research for a hospitality focused development firm

- Prepared proformas in excel to support prospective projects and acquisitions
- Lead market research with macro & market based financial due diligence and consolidation of recent transactions/comps across geographical targets
- Collaborated with design partners to analyze development sites & concepts to maximize asset value

**Qualcomm** – San Diego, CA

**2017 – 2020**

*Associate*

Qualcomm Automotive Strategy and FP&A - comprehensive financial analysis including monthly/quarterly P&L reporting, financial forecasts & business case assessment for 20% YoY growth business unit.

- Managed R&D pipeline (8-10 year) - viability & profitability analysis of next generation product roadmap
- Developed senior management messaging for earnings calls & press releases
- Lead Automotive Business Unit strategy (10 year strategic plan, market sizing, TAM/SAM, etc.)
- Partnered with cross functional executive teams (Program Management, Product Marketing, Engineering) to execute on customer deliverables/quotes & design proposals; current design win pipeline-\$6B
- Directed Automotive strategic pricing across all 9 regions; worked in tandem with internal Pdm teams to communicate and negotiate market pricing
- Created internal Tableau dashboard for other adjacent BU teams to sync forecast cycle timing across entire Qualcomm chip business
- Designed pricing model used in each BU's standard forecast cycle, efficiently allowing teams to accurately forecast all customer & product pricing from latest quotes/price indications
- Engaged with acquisition target management teams during due diligence & designed operational procedure for ownership transition upon transaction closing

## SKILLS & INTERESTS

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- Certifications: MOS Office Excel 2013, Bloomberg Certification-Equities, Tableau
- Interests: Golf, Triathlons

# CLARKE CAMPION

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## EDUCATION

**University of Southern California, Marshall School of Business** – Los Angeles, CA **May 2022**

*Master of Business Administration (STEM); Concentration in Real Estate Finance and Development*

- Leadership: Associate VP of Finance for USC Graduate Real Estate Association

**University of Southern California** – Los Angeles, CA **May 2014**

*Bachelor of Arts in International Relations Global Business*

- Honors: Graduated Cum Laude and on the Dean's List for Academic Excellence
- Research Intern: United Nations in Geneva, Switzerland

## EXPERIENCE

**Warner Bros. Entertainment Inc.** – Burbank, CA **2017 – 2020**

*Senior Specialist, Global Strategic Sourcing (2019 – 2020)*

- Authored and managed Corporate Real Estate RFPs and contract negotiations for architectural services, structural engineering, security systems, data center design, etc.; attained average cost of savings of 12% across all contracts.
- Developed financial models and long-term pricing strategies to drive investment decisions on the firm's technology services outsourcing model; presented recommendations, many of which were implemented, to Warner Bros.' CTO and Senior VPs.
- Assessed financial solvency and liquidity of 50+ new suppliers, providing risk assessments for business continuity planning.
- Managed 5+ cross-functional project teams concurrently; responsible for market research, requirement gathering, supplier identification, competitive bidding, pricing negotiations, and contract execution deliverables for all work streams.
- Advised and instructed C-level and Senior VP colleagues on supplier negotiation strategies for contract renewals.
- Managed change order negotiation and cost over-run disputes for key contracts over \$5M, resulting in savings of \$10M+.

*Specialist, Global Strategic Sourcing (2017 – 2018)*

- Project managed and led contract negotiations with 15 different logistics suppliers on behalf of 5 internal business units; restructured internal business processes and contract terms, resulting in 12% cost reduction off \$60M in annual spend.
- Created model reducing annual domestic fulfillment costs by 26% via competitive benchmarking and direct negotiations.
- Led competitive bids and contract negotiations for two Information Security programs, resulting in a 30% (or \$3M) reduction in annual spend and improved information security program for WB intellectual property.

**Visa, Inc.** – Foster City, CA **2015 – 2017**

*Analyst, Global Strategic Sourcing (2016 – 2017)*

- Analyzed \$800M in external supplier spend; recommended key savings initiatives and vendor consolidation opportunities to Visa's Chief Procurement Officer, resulting in organizational restructuring and \$20M+ in annual savings from suppliers.
- Created and executed an RFP to rationalize technology services category; achieved \$5M savings on \$25M annual spend.
- Directed 30+ RFP initiatives and negotiations, directly providing purchase recommendations to Visa's CTO.

*Associate Analyst, Global Strategic Sourcing (2015 – 2016)*

- Partnered with technology and consumer products groups to oversee RFPs; captured \$20M+ in savings over FY15 and FY16 through direct negotiations, supplier rationalization negotiations, and RFP initiatives.
- Drafted 100+ Statements of Work and Master Services/Software Agreements, ensuring contractual, legal, and risk compliance. Tracked vendor performance for high-spend contracts; resulting in 98%+ deliverables met.

**Infosys Consulting** – Milwaukee, WI **2014 – 2015**

*Consultant, High-Tech and Manufacturing Sector*

- Conducted weekly project governance activities and reporting; attained 100% on-time deliverable execution
- Defined and implemented operational Key Performance Indicators; resulted in avoidance of \$80,000 in penalties.

## SKILLS & INTERESTS

- Technical: Advanced Excel; Advanced PowerPoint.
- Interests: Surf Instructor for under-served youth surf camp (2017-Present); Intramural softball league captain (2015-Present); Outdoor Guide for SC Outfitters, USC's largest student-run outdoor education organization (2010-2014).
- Entrepreneurial: Financial Advisor and Board Member for Sonoma Syrup Co., a family-owned specialty food company.

# LOUIS BENEDICT, CFA

1163 N Coronado Street, Los Angeles, CA • louis.benedict.2022@marshall.usc.edu • (917) 484-2461 • linkedin.com/in/louisbenedict

## EDUCATION

**University of Southern California, Marshall School of Business** – Los Angeles, CA

**May 2022**

*Master of Business Administration (STEM)*

- Honors: Dean's Merit Scholarship; GPA 3.7/4.0
- Leadership: AVP of Investment Management, Marshall Finance Association; AVP of Finance, MBA Partners

**CFA Institute** – New York, New York & Washington, D.C.

**October 2020**

*Chartered Financial Analyst (CFA) Charterholder*

- One of 8% of 2010-2019 test takers to pass all 3 exams; Level I (2015), Level II (2016), Level III (2017)

**George Washington University** – Washington, D.C.

**May 2016**

*Bachelor of Arts, Economics*

- Honors: *cum laude*, Dean's List (2015); GPA 3.5/4.0
- Leadership: Founder / President, Club Squash; Operations and Alumni Relations Director, Finance and Investments Club

## EXPERIENCE

**Capital One** – New York, New York & Vienna, VA

**2017 – 2020**

*Senior Equity Research Associate, Real Estate Investment Trusts (REITs)*

- Increased quality of research votes (votes from institutional investors for best sell-side research) by 300% in one year together with senior analyst
- Built and maintained financial models with granular earnings estimates for 18 companies, identified trends in large datasets, contributed to writing of 400+ published research notes distributed to 925+ investors and public company executives
- Ideated and executed differentiated research (e.g. assessing the impact of future city and state minimum wage increases on healthcare REIT expenses in 2019 / 2020)
- Discussed questions generated from fundamental research with covered companies' management 6+ times monthly; answered investors' stock-specific questions and justified financial modeling assumptions
- Initiated coverage on 18 REITs in Apartment, Healthcare, Student Housing sectors with senior analyst
- Incorporated knowledge gleaned from meeting with 65+ investors and company executives at bi-annual National Association of Real Estate Investment Trusts Investor Conference into individual stock theses
- Led by example through mentoring junior teammates without formal program; enhanced productivity by improving engagement and demonstrating best practices; recommended intern hired full-time in 2017

**Goldman Sachs** – New York, New York

**2016 – 2017**

*Equity Research Associate, Food Distributors & Restaurants*

- Wrote first drafts of published research notes after identifying restaurant industry trends in 450+ data point economic reports (e.g. Bureau of Labor Statistics' Employment Situation Summary)
- Evaluated pricing and menu offering strategy of global fast-food chain in 6 cities using manually sourced data from 40 quarterly earnings call transcripts; analysis supported maintaining Hold investment rating
- Supported price increase estimates by collecting 240 quarterly total revenue figures for 20 publicly traded restaurants from first quarter 2015 to fourth quarter 2017 earnings reports
- Verified accuracy of 730+ data points while updating 50+ page presentation for weekly client meetings to reflect new data and investment ratings

## Internships

- Capital One, *REITs Equity Research Summer Intern* – Built unemployment database using Bureau of Labor Statistics data to examine wage growth impact on earnings; updated 20 financial models after 2Q15 earnings releases (2015)
- Moore Capital Management, *Equity Strategies Intern* – Pitched investment ideas to portfolio managers; built earnings forecasts and financial models to analyze potential investments (2014)

## SKILLS & INTERESTS

- Personal Investing: Largest current positions are Facebook, Match Group
- Skills: Bloomberg Terminal Certified, intermediate-advanced proficiency in Capital IQ, CoStar, FactSet, Microsoft Excel
- Interests: Skiing, tennis, squash, abstract painting, meditation, reading, cognitive biases, travel

# MITCHELL CARTER

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Long Beach, CA • (760) 420-8830 • Mitchell.Carter.2022@Marshall.usc.edu

## EDUCATION

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**University of Southern California, Marshall School of Business** – Los Angeles, CA

**June 2022**

*Master of Business Administration (STEM)*

- Leadership: AVP External Relations, Graduate Real Estate Association
- Membership: Marshall Finance Association

**California State University, San Marcos** – San Marcos, CA

**May 2016**

*Bachelor of Science in Finance*

- Leadership: University Soccer Team

## PROFESSIONAL EXPERIENCE

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**Virgo Investment Group** (Growth Equity & Credit Fund) – Burlingame, CA

**2020 – Present**

*Fall Investment Analyst (Credit-Focused Strategy)*

- Analyze opportunities for strategic reallocations within the existing portfolio, including ABS buyouts, securitization, and selective acquisition of asset-backed securities (EETC, ABS) to maximize return
- Evaluate new opportunities and present substantiated recommendations to the Virgo investment committee
- Assist and provide guidance on the strategy development of fourth aircraft fund (Zephyrus IV) which allows for increased incorporation of opportunistic or distressed asset-backed securities

**Brava Management** (Real Estate Private Equity) – Newport Beach, CA

**2020 – Present**

*Senior Associate / Consultant*

- Underwrite investment opportunities by building financial models for development and investment structures including LP/GP fee and capital structuring (current acquisitions pending)
- Create investment marketing materials and memoranda, provide ad-hoc research and analysis
- Partner with company management team to identify and establish strong partnerships with LP and co-GP investors

**Green Street Advisors** (Public and private real estate advisory services) – Newport Beach, CA

**2017 – 2020**

*Senior Associate (2019 – 2020); Associate (2017 – 2019) – Advisory and Consulting Group*

- Advised The Blackstone Group on first ever REIT IPO in India, Embassy Office Parks; worked onsite with client and counsel to guide the entity through the process and attracted western institutional interest (2.5x oversubscribed)
- Identified shortcomings and opportunities for remediation to enhance shareholder value to activist investor during proxy battle with public REIT; resulted in +15% stock gain in month following first proxy letter
- Analyzed and critiqued the real estate capital allocation framework of a \$50B+ real estate arm of a Canadian pension fund; presented findings to client investment committee and was selected as project lead for subsequent two engagements to build data-driven market selection models
- Valued and analyzed a portfolio of assets of a distressed department store retailer for a consortium of hedge funds; co-developed valuation methodology/model and created key deliverables including analysis and overview deck

**W Partners Group LLC** – La Jolla, CA

**2016 – 2017**

*Analyst Investment Banking (Generalist)*

- Met independently with clients, prepared valuation analyses, financial models and CIMs / PPMs as lead analyst on all firm deals, including buy/sell-side M&A and debt/equity financings
- Prepared PPM, due diligence material, and built operating and debt covenant financial model in collaboration with Luna Grill LLC executives; raised \$80M total capital, \$30M as senior credit facility and \$50M in private equity funding
- Conducted due diligence for acquisition of 48 Little Caesars franchise locations by Four Foods Group, LLC; analyzed geographic strategy and built a detailed financial model that validated the investment thesis

## ADDITIONAL SKILLS & CERTIFICATIONS

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- Additional Skills: VBA, Argus
- Certifications: Series 7 & 66 (CRD#: 6331908), CFA Level III Candidate (May 2021)

# PATRICK M. MCGOWAN

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616 St. Paul Avenue, Los Angeles, CA 90017 • Patrick.mcgowan.2021@marshall.usc.edu • (626) 590-3896

## EDUCATION

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**University of Southern California, Marshall School of Business** – Los Angeles, CA **December 2020**

*Master of Business Administration*

- *Memberships:* Graduate Real Estate Association (VP - External Relations); Marshall Finance Association

**Southern Methodist University, Cox School of Business** – Dallas, TX **May 2011**

*Bachelor of Business Administration, emphasis in Finance*

- *Honors:* SMU University Scholar
- *Study Abroad:* Oxford University (Summer 2009) and Chinese University of Hong Kong (Summer 2010)

## EXPERIENCE

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**BentallGreenOak** – Los Angeles, CA **Summer 2020**

*MBA Summer Intern*

- Researched new and existing U.S. markets, evaluating economic and demographic trends, and investigated distressed assets looking for a recapitalization or disposition due to COVID-19 induced disruptions across all product types and equity strategies for the U.S. investments team.
- Performed calls with BGO partners, market specialists, brokers to solicit real-time feedback on real estate transactions and capital markets and assisted with research for specific lease and acquisition deals.
- Conducted research on Data Centers and provided recommendations to Senior Management on investment trends, strategies, and theses related to BGO strategies.

**The Caster Group** – Los Angeles, CA **Summer 2019**

*Acquisitions/Development Intern*

- Created, updated, and maintained 10+ detailed financial models for existing and potential investments for fully integrated real estate development and investment firm focusing on self-storage with over 51 properties in California with an estimated market value of properties of \$1.0 billion.
- Conducted financial analysis, underwriting, real estate zoning research, market research, competitive analysis, and due diligence of potential investments in new markets and collaborated on weekly presentations including memoranda, deal summaries, and cohesive deal recommendations.

**Higgins, Marcus & Lovett, Inc.** – Los Angeles, CA **2011 – Summer 2019**

*Senior Associate*

- Performed complex financial analyses and modeling, including real estate cash flow projections, corporate cash flow projections, public and private corporate/entity-level valuations of business entities with average enterprise values of \$30 million across various industries.
- Led project team of three during analysis, meetings, strategic initiatives, and presentations and served as account manager and a liaison between project team and client to ensure all client requirements were appropriately identified, satisfied, and diverted potential problems to reduce costs.
- Managed relationship with 15+ clients with a total budget of approximately \$200,000 on a week-to-week basis with minimal oversight; trained new employees.
- Led and supervised assisting clients with mergers, acquisitions, dispositions, taxation planning, compliance, financial reporting, bankruptcy, litigation, dispute resolution, and strategic planning.

## SKILLS & INTERESTS

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- *Computer:* Microsoft Office, ARGUS Enterprise, Capital IQ, Thomson One, and Yardi Matrix
- *Interests:* Golf, basketball, and Trojan Football



# FERNANDO ZEPEDA

Los Angeles, CA 90066 • Fernando.Zepeda.2022@marshall.usc.edu • (310) 493-6908 • LinkedIn.com/in/FZZP

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## EDUCATION

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**University of Southern California, Marshall School of Business** – Los Angeles, CA

**May 2022**

*Master of Business Administration*

- Accomplishments: USC Stock Pitch Competition Winner, USC Case Competition Finalist
- Memberships: Marshall Finance Association, Graduate Real Estate Association

**Occidental College** – Los Angeles, CA

**May 2014**

*Bachelor of Arts, History; Sociology*

## EXPERIENCE

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**Irongate LLC** – Los Angeles, CA

**2015 – Present**

*Costa Palmas Development Associate (2019 – Present)*

- Managed all finances and operations for Costa Palmas Four Seasons and Amanvari residences in Los Cabos Mexico, the largest projects for a boutique development firm specializing in luxury branded condo-hotels and resorts. Partner brands include Trump Hotels, Ritz-Carlton, SoHo, Four Seasons and Aman.
- Generated on average \$90,000 per month in fees for the management of single-family residences in Los Cabos Mexico by coordinating the design and construction for clients. Currently managing a total value of \$250+ Million in real estate for high net-worth individuals.
- Earned approximately \$9.5+ Million in savings through successful negotiations with designers, engineers, and contractors by leveraging economies of scale and facilitating partnerships between local and international firms.
- Investigated and implemented telecom infrastructure required to service 200+ homes in masterplan. Expected to generate an expected 32% in revenue.
- Optimized operational processes for project managers (PMs) by developing comprehensive workbooks that automate financial reports and administrative forms, thereby reducing administrative work for PMs by 28% per day.
- Developed partnerships with luxury brands – Crestron, Waterworks, Skyframe, Fireclay – to receive preferred pricing and extended warranties, yielding 35% in savings on average.
- Revised relationships between architects and engineers to improve the design phase by 15% and earn contractors an additional month to resolve design issues, thereby minimizing cost overruns.

*Sr. Accountant/Analyst (2015 – 2018)*

- Restructured the company's importation procedures to avoid \$75,000 in taxes, per home, for all future homes by improving the flow of funds and establishing strict procedures for vendors.
- Presented monthly financial reports ranging from \$8 Million to \$15 Million to the CFO and banks for equity and debt approval, respectively.

**Cetera Advisor Networks** – Los Angeles, CA

**2014 – 2015**

*Data Analyst*

- Led operational restructuring of reporting from analysts to financial advisors for an independent broker-dealer with \$25+ Billion of assets under management, improving efficiencies by 15%.
- Assisted financial advisors with the management of 300+ portfolios and streamlined requests from clients.

**Project Launch Inc** – Orange, CA

**2014**

*Senior Sales Associate*

- Generated \$350,000+ in revenue with close to 70% customer retention for Quill targeting small to mid-sized businesses through in-person cold calls.
- Managed three Jr Sales associates and ranked sales top two salesman nationally for consecutive weeks.

## SKILLS & INTERESTS

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- *Languages:* Spanish (Fluent)
- *Computer:* Excel (Financial Modeling), Procore, BIM360, Builder Trend, Salesforce
- *Interests:* Rugby, Chess, Business Podcasts

# Garik Onany

La Canada, CA • 818-967-1101 • onany@usc.edu

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## EDUCATION

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### University of Southern California

*Dollinger Master of Real Estate Development*

Los Angeles, CA

August 2021

### University of California, Davis

*Bachelor of Science, Managerial Economics with an emphasis in Business Economics*

La Jolla, CA

December 2017

Relevant Coursework: Investments, Financial Management, Real Estate Economics, Econometrics

## EXPERIENCE

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### Vigen Onany & Associates

*Real Estate Budget Preparer*

La Crescenta, CA

*January 2018-present*

Produced Operating Budgets for over 200 multifamily, mixed-use and retail (shopping center) projects that identify the operating and reserve costs for Homeowners Associations, and prepared Reserve Studies to evaluate the conditions of older buildings and their “reserve” components.

- Reviewed tract maps and parcel maps as well as architectural, landscape and roof plans to note the dimensions of the inventory and common area, to prepare budgets that dictate which costs to allocate to which association or sub-associations.
- Produced Financial Statement Analysis worksheets and Reserve Analysis Worksheets to evaluate the financial standing of HOAs as well as their future financial obligations.
- Met with developers regarding zoning and entitlements and conducted site visits which was then followed by budget work regarding financial feasibility of options up until the sales process.

### Adept Development, LLC

*Intern*

Pasadena, CA

*June-August 2017*

Performed market and asset level analysis for acquisition of properties in over 20 incorporated cities in Southern California depending on the risk/return profile the firm sought at the time.

- Collaborated in making PowerPoint Presentations on current and future projects in the pipeline to present to our investors or potential buyers.
- Conducted site visits to evaluate potential lots and properties to build on or re-develop and attended construction sites to note the progress of current projects.
- Partook in charrettes with developers, investors, city employees, architects, general contractors and attorneys to note what each party needed to move forward with the process.

### Strategic Development Advisors, Inc.

*Intern*

Pasadena, CA

*June -August 2016*

Conducted market level analysis for our commercial real estate clients (specifically shopping malls), to increase store footprint without cannibalizing revenue--through calculations to create the optimal mix, maximizing revenue/sf.

- Studied plans, parcel maps and tract maps to match clients' specifications with lots we found followed by financial analysis of these potential investment opportunities.
- Attended weekly in-house site review meetings with brokers and participated in presenting information for new sites to be pursued.
- Updated financial models and budgets for ongoing developments and investments as new information became available.

## ADDITIONAL INFORMATION

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*Languages:* Fluent Armenian, Proficient Spanish

*Professional Affiliations:* Urban Land Institute, GREA

*Computer Skills:* Proficient in Microsoft Excel, Sage 50 Tax Accounting Program, Bluebeam Revu

# JUSTIN CHEUNG

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## EDUCATION

**University of Southern California, Marshall School of Business** – Los Angeles, CA **May 2021**  
*Master of Business Administration*

**Indiana University** – Bloomington, IN **May 2014**  
*Bachelor of Arts, Economics & Political Science; Minor: Business*

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## EXPERIENCE

**Vestar** – Long Beach, CA **June 2020 – August 2020**  
*MBA Summer Associate*

- Assisted with the initial underwriting and due diligence efforts on potential major shopping center acquisitions of over 1 million SF across the western US region.
- Prepared and performed detailed financial modeling analysis to project cash flow, return, debt, and JV equity waterfalls for various shopping center redevelopments including the construction of 400+ multifamily units and parking structures, and was involved in the planning meetings with architects and project managers.
- Executed various leasing analyses including re-tenanting, commission payouts, and termination fees as well as compiling a database of tenant options for more than 100 tenants.
- Participated in bi-weekly Covid-19 at-risk tenant meetings with senior management in regards to contracts, leasing, and legal disputes.
- Created a database on potential tenants, brokers, various construction cost estimates, and market research across various geographic regions.
- Assisted in the production of investor and internal presentations for the firm's notes acquisition initiative.

**DAS Management, Inc.** – Greater Los Angeles, CA **2017 – 2020**  
*Property Manager & Co-Owner*

- Decreased operating expenses by 13% by developing cost saving strategies after analyzing each property's cash flows in addition to forecasting, creating, and implementing budgets to account for all expenses resulting in the acquisition of an additional 44,000 sq. ft under management.
- Organized and led monthly meetings with owners to review the financial performance of their properties.
- Targeted higher quality tenants and implemented low-cost high value-added property improvements, allowing us to realize a 15% increase in rent; 5% above market rate in an otherwise flat market condition.
- Built and leveraged a robust network of contractors, security, and maintenance services to enable a more streamlined internal process and to ensure operational efficiency.

**FirstService Residential** – Irvine, CA **2017 - 2018**  
*Pricing & Contracts Analyst*

- Generated P&L to determine current or potential client profitability and presented my analysis to management.
- Drafted and administered all contracts and pricing renewals and managed the annual contract/service pricing revision process for 370+ clients to successfully ensure company pricing was in line with current industry trends and maintained profitability throughout business units.
- Conducted quarterly analysis for 100+ clients to confirm pricing allocations for the sales team which resulted in a quicker turnaround time for employee compensation.
- Managed the CARIA and Great Plains databases and communicated changes in pricing and client acquisitions in monthly meetings with various departments and key executives resulting in simplified internal processes and readily available information for all employees to use.

**JP Morgan Chase Bank** – Greater Los Angeles, CA **2016 - 2017**  
*Licensed Relationship Banker*

- Analyzed existing client base and identified cross selling opportunities specifically in regards to investments, mortgages, and small business needs, resulting in the implementation of various client-specific investment strategies.

**AXA Advisors.** – Irvine, CA **2014 - 2016**  
*Financial Consultant*

- Developed customized tax efficient financial solutions in regards to investments, risk management, and retirement planning for employees in the education system.

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## SKILLS & INTERESTS

- *Languages:* English, Cantonese (Intermediate)
- *Interests:* LA Lakers, Health & Fitness, Hiking, and Traveling
- *Associations:* Urban Land Institute, International Council of Shopping Centers, USC Graduate Real Estate Association

# Conner G. Howe

---

Los Angeles, CA • 253-514-5258 • howeconner@gmail.com

## EDUCATION

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### University of Southern California, Price School

Los Angeles, CA

*Dollinger Master of Real Estate Development*

May 2021

- VP of External Relationships | Graduate Real Estate Association
- Relevant Course Work: Capital Markets, Entitlements, Design, Multi-Family, Office, Mixed-Use, and Urban Infill Development, and Asset Management

### San Diego State University

San Diego, CA

*Bachelor of Science, Finance*

May 2016

- Study abroad: University of Bocconi, Milan, Italy (Spring 2015)
- Real Estate Society (RES); RES Mentorship Program; ULI Case Competition; Sigma Alpha Epsilon

## EXPERIENCE

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### Pierce Education Properties

San Diego, CA

*Acquisition Analyst*

2018 – 2020

Conducted asset and market level analysis for the acquisition and disposition of nine purpose-built student housing assets totaling \$250M for the top 15<sup>th</sup> largest student housing owner and operator. Developed an acute understanding of public pension funds, insurance companies, private equity groups, placement agents through equity raises.

- Structured and presented an 18-property portfolio recapitalization opportunity comprised of 6 core and 12 value-add properties (\$15M renovation budget) to investment committee which led to a listing agreement with Eastdil Secured.
- Assessed the financial feasibility of 30+ core, core-plus, and value-add student housing assets exceeding \$1.2B (\$35M average deal size).
- Utilized a data driven approach to establish a target market list of 100+ public universities.

*Asset Management Analyst*

2016 – 2018

Evaluated asset level data, analyzed trends, and identified rehabilitation opportunities to drive financial and operational efficiencies for a \$750M portfolio consisting of 11 core and 12 value-add assets across 23 universities.

- Generated annual budgets and business plans, performed quarterly valuations and hold versus sell analyses, identified major capital renovations, and benchmarked asset performance to NCREIF's NPI, ACC, and EdR.
- Assisted with weekly, quarterly, and annual investor reporting for the JVs with a public pension fund, insurance company, and open-ended co-mingled fund.
- Awarded "Corporate Employee of the Year" for developing an autonomous reporting system that strengthened data integrity and operational efficiency and for spearheading an AirBnB program that backfilled vacancy at properties in lease-up, generating \$200,000+ in revenue.

*Intern*

Summer 2016

Conducted extensive research on the institutional capital industry to help PEP elevate student housing as a niche investment sector for institutional capital through an aggressive public relations plan.

## ADDITIONAL INFORMATION

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*Professional Affiliations:* Urban Land Institute, NAIOP, NMHC, ICSC

*Computer Skills:* Proficient in Microsoft Excel, ARGUS, Bluebeam Revu, and SketchUp

*Fun Fact:* Snow skied and snowboarded across the world: most notably the Italian, Swiss and Austrian Alps, Hokkaido Japan, British Columbia, and most of the United States.

# Scott A. Hougham

Sacramento, CA • 415-696-3313 • shougham@usc.edu

---

## EDUCATION

### University of Southern California

Los Angeles, CA

*Dollinger Master of Real Estate Development*

May 2021

- Graduate Real Estate Association VP of Industry Outreach – Mentorship

### University of Louisville

Louisville, KY

*Master of Business Administration*

May 2016

- Forcht Entrepreneurship Fellow

### University of Kentucky

Louisville, KY

*Bachelor of Arts in Biology*

August 2013

- Minor in History

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## EXPERIENCE

### Atria Senior Living

California, Kentucky

Atria is a premiere senior housing owner/operator with 215+ assets in 30 US states and Canada. Renowned in the industry for vertical integration, quality delivery, and market cycle resilience.

*Development Project Manager, Redevelopment*

2018-2020

- Led all activities of project team and external consultants on all 7 active West projects (\$90MM at a given time).
- Crafted monthly financial reporting for senior leadership, 2 public REITs, and multiple JV partners.
- Conducted market analysis and spatial programming to ensure assets met market demands.
- Company expert on evacuation/recovery efforts as lead for 2018 Paradise Camp Fire and 2017 Hurricane Harvey.

*Senior Project Analyst, Owner Relations & Asset Management*

2017-2018

- Tapped to lead significant acquisition/integration/disposition cycle for Western US totaling ~\$600MM
- Conducted portfolio-wide spatial efficiency analysis now driving design of \$500MM active developments

*Project Lead, Strategic Project Management Office*

2015-2017

- Product manager for multiple new software platforms including new document management system with time savings of 7,000 hours annually, mobile caregiver task tracking app, and incident reporting system designed to increase visibility to state regulators nationwide.

*Business Optimization Analyst, Business Optimization*

2014-2015

- Prepared analyses and content for company's quarterly reports and investor relations presentations.
- Streamlined quality enhancement program through a redesign to accommodate 20% portfolio grown in one transaction during first foray into the Canadian market.

### DV Tech

Louisville, KY

*Co-Founder & VP of Operations*

2015 – 2017

DV Tech was a chemical engineering startup commercializing rubber devulcanization using lean launch methodologies. Directly responsible for investment funding, partnerships, product development, and tech/business integration.

- Invited by NASA's CASIS to send technology to International Space Station for testing.
- Received LOI from dominant multi-national rubber manufacturer.
- Ultimately wound down company, though it was subsequently pursued by another ownership entity.

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## ADDITIONAL INFORMATION

*Community Engagement:* Startup accelerator mentor (Startup Weekend Next, NASA Hackathon, UC Davis, Illumina)

*Professional Affiliations:* Urban Land Institute, Project Management Institute

*Computer Skills:* Proficient in Microsoft Excel, Bluebeam

*Certifications:* Project Management Professional (PMP), Certified Lean Six Sigma Green Belt (CLSSGB)

# Juan Trinidad

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Los Angeles, CA • 310-463-2114 • jmtrinidad@usc.edu

## EDUCATION

---

### University of Southern California

*Dollinger Master of Real Estate Development*

Los Angeles, CA

May 2021

### Indiana University

*Bachelor of Arts, Economics*

*Minor in Finance*

Bloomington, IN

May 2015

## PROFESSIONAL EXPERIENCE

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### Hunt Capital Partners

*Senior Financial Analyst, Acquisitions*

*Financial Analyst, Acquisitions & Funds Management*

Los Angeles, CA

September 2018 - May 2020

March 2017- September 2018

Hunt is a national low-income housing syndicator with over \$2.2 B in equity investments across 38 funds. Worked in conjunction with the Managing Director in market and asset level analysis of potential investments.

- Underwrote low-income housing investments to determine the financial performance and investment feasibility of over 50 properties nationwide and conducted IRR sensitivity analysis of various debt structures, waterfalls, and equity contribution schedules for investments in excess of \$350M.
- Negotiated and drafted letter of intent agreements specific to each partnership structure for equity investments ranging from \$5M to \$50M.
- Liaised between Hunt and developers, general partners, and lenders during the due diligence phase in order to analyze debt term sheets, general partners' financials, market studies, and sponsor experience.
- Managed and trained the analyst team in evaluating potential investments and in analyzing the performance of existing assets relative to initial projections.

*Project Analyst, Investor Relations & Reporting*

November 2016 – March 2017

- Analyzed and summarized the performance of newly closed investments in the lease-up and pre-stabilized phase and of stabilized assets relative to historical data and closing projections.
- Evaluated developer draw requests to ensure sources of funds remain in balance and in compliance with partnership agreement and assisted the Investor Reporting group in the release of equity and debt to asset level partnerships.
- Prepared quarterly investor reporting packages inclusive of property level operations and fund level performance for institutional investors including J.P. Morgan, Citi, Aetna, and Bank of Hawaii.

### JRK Property Holdings

Los Angeles, CA

JRK is a private-equity real estate investment firm specializing in the management and redevelopment of multi-family properties in primary and secondary markets.

*Analyst, Asset Management*

August 2015 – March 2016

- Analyze and monitor the performance of over 70 individual properties and conducted variance analysis in order to identify opportunities for creating operational efficiencies.
- Spearheaded the firm's utility infrastructure improvement campaign and coordinated the execution of utility infrastructure improvements between asset managers, property managers, and vendors.
- Supported the VP of asset management in the negotiation and bidding of utility contracts.
- Surveyed comparable properties in close proximity to the firm's assets in order to track market performance and to price rents for vacant units.

## ADDITIONAL INFORMATION

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*Languages:* Fluent in Tagalog

*Professional Affiliations:* Urban Land Institute

*Computer Skills:* Proficient in Microsoft Excel

# Nathan Ricks

Los Angeles, CA • 801-310-2656 • nricks13@gmail.com

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## EDUCATION

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### University of Southern California

Los Angeles, CA

*Dollinger Master of Real Estate Development*

May 2021

- Relevant Coursework: real estate finance, construction management, entitlements, capital markets, analysis

### Brigham Young University – Marriott School of Management

Provo, UT

*Bachelor of Science in Business Management*

April 2017

- Marriott Business School Student Council: Spearheaded the Marriott Choose to Give Campaign
- Member of The Finance Society Real Estate Club

### Brigham Young University Jerusalem Center for Near Eastern Studies

Jerusalem, Israel

*Discourses on Politics, History, and Religion*

Winter 2015

- Lived in Jerusalem while studying Near Eastern culture, history, religion, conflicts, and current events.

## EXPERIENCE

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### DR Horton, Inc.

Salt Lake City, UT

*Sales Consultant*

June 2018 – June 2020

DR Horton is one of the largest residential home builders in the country. Working in their Utah division, which covered the entire state, I oversaw the sales process from first interaction with the buyer, through the construction and closing phases of new homes.

- Top selling consultant in highest dollar volume for the Utah Division, which included 30 sales consultants, for 2019 generating over \$23M in revenue.
- Most units sold in Utah Division for Q3 2019 & Q1 2020, reached 157% and 200%, of target goals.
- Led effective marketing and website campaigns which led to increased traffic and appointments resulting in becoming the top selling consultant.
- Led weekly meetings with superintendents to review construction schedules, mitigate issues, and ensure customer satisfaction.
- Communicated daily with loan officers and buyers concerning financing updates and coordinating closings.

### Bluebird Capital

Provo, UT

*Independent Property Manager*

May 2015 – Present

Bluebird Capital is a company I created under which I put my investments and side projects. I have accumulated two rental properties which I currently manage, I flipped another residential property, and syndicated two private real estate loans.

- Bought and remodeled three properties resulting in a 25% increase in property value and 30% increase in rent.
- Oversaw complete renovation of a 1965 home, resulting in a 50% increase in value and above market rents.
- Syndicated a \$600,000 mezzanine loan for a 60 unit multifamily project & a \$4M land development loan.
- Communicated with investors and assisted in raising funds for both deals, personally raised over \$600,000.

## SERVICE

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### Church of Jesus Christ of Latter-day Saints

Salta, Argentina

*Volunteer Representative*

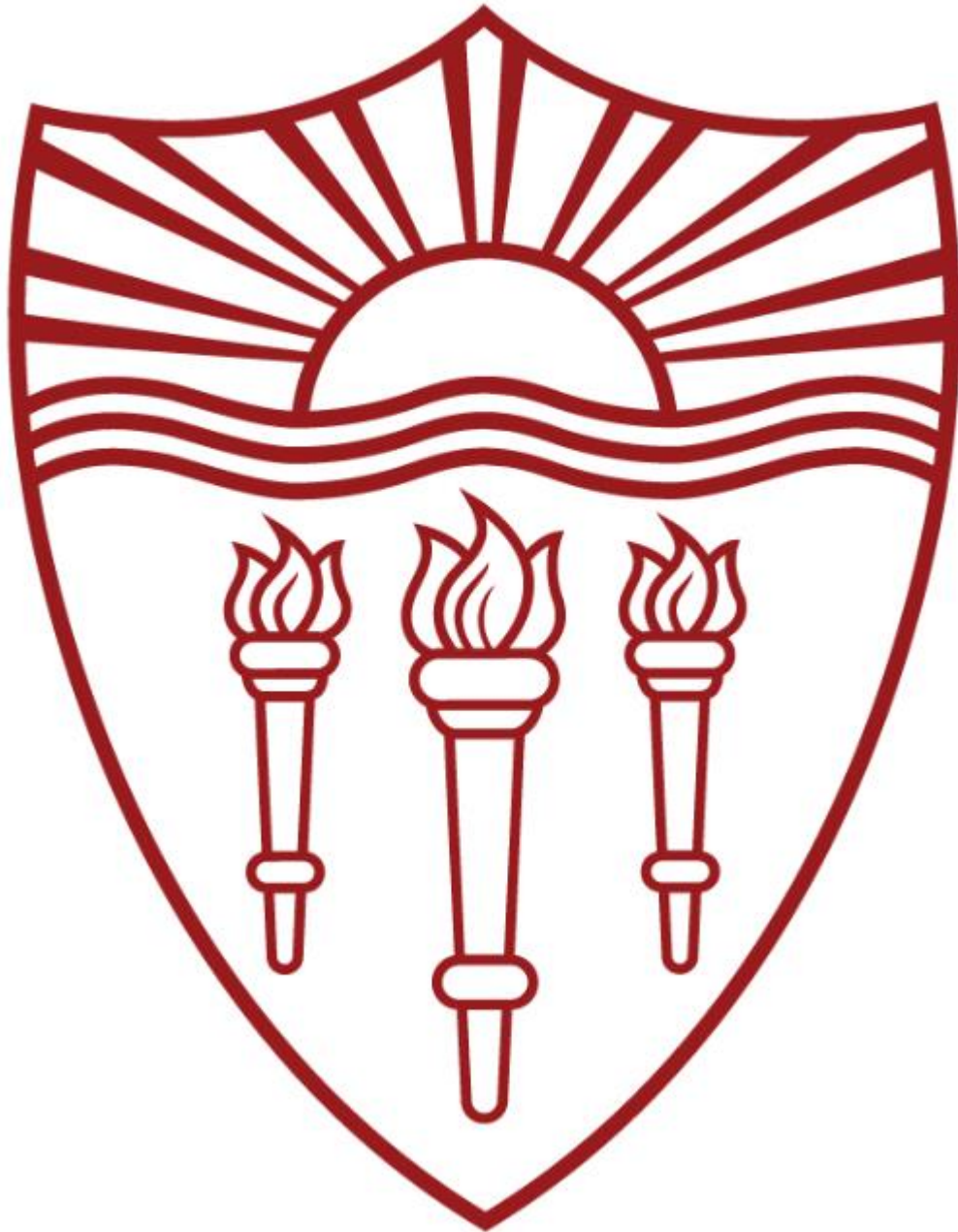
Aug 2011 – Aug 2013

- Directed the efforts of 25 service representatives, with the purpose of improving strategy and execution.
- Organized presentations and conferences, which focused on effective instruction and service.

## Additional Information

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- Fluent in Spanish – written, oral, and reading.
- Computer skills: Argus Enterprise Certified; Microsoft Office Specialist for Office Excel 2016 Certification
- Heli-skied in Canada, spent 14 days rafting The Grand Canyon, avid golfer and mountain biker.



**End of Resume Book**





# **University of Wisconsin School of Business**



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## **Wisconsin School of Business Masters in Real Estate**

**Class of 2021 Resumes**

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Gina Jenkins, Director, MBA/MS Career Management, [gina.jenkins@wisc.edu](mailto:gina.jenkins@wisc.edu)

Betsy Golomski, Assistant Director, MBA/MS Career Management, [betsy.golomski@wisc.edu](mailto:betsy.golomski@wisc.edu)

Sandra Kubat, Assistant Director, MBA/MS Career Management, [sandra.kubat@wisc.edu](mailto:sandra.kubat@wisc.edu)

Kyle Casey, Employer Relations & Events Coordinator, [kyle.casey@wisc.edu](mailto:kyle.casey@wisc.edu)

# PATRICK BARKER

(630) 779-9056 • linkedin.com/in/patrick-barker3 • patbarker1121@gmail.com

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021  
*Master of Science in Real Estate Candidate*

- Key Coursework: Private Equity I & II, Real Estate Valuation, Excel and Argus modeling, Commercial Property Development, Real Estate Finance, Urban Economics

**University of Illinois Urbana-Champaign, Gies College of Business, Illinois** 2015 – 2019  
*Bachelor of Science in Finance*

- Major: Finance
- GPA: 3.7

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## PROFESSIONAL EXPERIENCE

**Enfusion LLC, Chicago, Illinois** 07/19 – 08/20  
*Product Consulting Analyst*

- Facilitated portfolio management in a client-facing role for 30+ hedge funds with +\$30 billion in assets under management
- Performed position valuations and performance metric calculations for securities ranging from listed securities, swaps, FX, and derivatives, based on client's portfolio structure
- Maintained hedge fund accounting along with reconciliation between the Fund's income statement, balance sheet, and cash flow activity
- Enhanced the system's reporting capabilities by customizing portfolio exposure outputs utilizing JavaScript, SQL, and Excel

**GCM Grosvenor, Chicago, Illinois** 05/18 – 08/18  
*Investments Intern*

- Worked as one of three interns with the portfolio management team for a global alternative asset management firm with nearly \$50 billion in assets under management
- Developed and presented an investment proposal highlighting a custom hedge fund selection process to the investment team utilizing resources from various departments including research, portfolio management, and risk management
- Analyzed the accuracy of the firm's flagship investment vehicle on its risk adjusted return target using statistical modeling and proprietary analytical reports

**Casechek, Chicago, Illinois** 05/17 – 08/17  
*Product Development Intern*

- Authored a white paper highlighting the integration of Casechek's system into a leading Chicagoland teaching hospital and the relative value it created
- Oversaw and organized the restructuring of Casechek's website by managing third party web developers and Casechek's internal marketing team

**Mesirow Financial, Chicago, Illinois** 12/15 – 01/16  
*Investments Intern*

- Assisted in the due diligence and underwriting of the Sale-Leaseback acquisition of a \$200 million 143-store portfolio of Bob Evans restaurants
- Built a visual representation of the Bob Evans portfolio using Prezi to help determine the feasibility of the purchase

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## TECHNICAL SKILLS

- ARGUS, REIT Financial Modeling, Microsoft Excel, Microsoft Word, Microsoft PowerPoint

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## ACTIVITIES

**Illinois Business Council** 01/16 – 05/19

- Selected as one of 27 from a pool of 270 applicants as part of the Spring 2016 Class and actively participated and organized professional, philanthropic, and social events for seven semesters
- Organized the annual charity golf outing for Business Council members and corporate sponsors raising over \$1,500

**University of Illinois** 01/17 – 05/17  
*Economics Teacher's Assistant*

- Selected from a group of students who excelled in Econ 203, Economic Statistics II, to serve as a teacher's assistant for a +100-student class
- Assisted the professor during lectures by fielding questions from the student audience, as well as holding office hours

# JEFFREY BIRDWELL

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI**  
*Master of Science Real Estate Candidate*

**2020 – 2021**

**University of Michigan, Ann Arbor, MI**  
*Bachelor of General Studies*

**2016 – 2020**

- Major: Economics, Business and Psychology
- GPA: 3.45

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## PROFESSIONAL EXPERIENCE

**Gorelick Real Estate, Cleveland, Ohio**  
*Project Manager*

**06/19 – 09/19**

- Managed 12 single family home renovation projects over a three-month period acting as the liaison between ownership group, contractors and cities
- Fostered healthy relationships with building and hosing departments, working with inspectors on passing competed projects
- Hired contractors and developed a system to efficiently clear all Point of Sale Inspections for recently acquired units with high levels of deferred maintenance
- Hired 3 full time maintenance staff, delegating work orders on a daily basis

**Clark Pacific, Woodland, California**  
*Quality Control, Production and Batch Plant*

**06/18 – 09/18**

- Resolved quality control issues with rebar cages and form dimensions prior to pour, in addition to analyzing concrete mixes ensuring proper attributes once panels set
- Executed 'on the line' production, creating precast I-beams, building forms, tying rebar, pouring concrete and stripping 20-ton panels with gantry cranes

**Hartman Davidson Racing LLC, Bloomfield Hills, MI**  
*Driver and Principal*

**03/2014 – Current**

- Opened an automobile racing program with 2 cars and a team of 6 people, recently finishing 2<sup>nd</sup> in the 2019 Super Touring 4 National Championship and entering a professional racing series, Trans Am, in the 2020 season
- Drive both race cars in addition to regular physical and simulator-based training, resulting in peak competitive performance with 6 wins in the 2019 season
- Ensure financial feasibility and competitiveness of race cars through direct management of app prep, transportation and trackside maintenance

**Hartman & Tyner, Southfield, Michigan**  
*Job Title*

**06/12 – 09/18**

- Performed landscaping, demolition, HVAC, electrical, plumbing and maintenance duties during summers to learn what is required in maintaining/developing multifamily properties on the asset level
- Employed as leasing agent at Stonybrook Apartments, renewing over 100 leases and signing new tenants
- Supported the upkeep of 60 truck fleet, analyzing service costs and evaluating replacement options to ensure minimum down time during plowing season, safety of vehicles and reduced maintenance costs
- Pioneered new maintenance strategy for golf carts which includes bi-annual physical evaluation of carts, as well as shifting ownership from individual complexes to parent company, leading to an increase in accountability for golf cart users reducing maintenance costs and downtime

**Bird Arrow LLC, Portola Valley, California**  
*Operator*

**06/12 – 09/16**

- Founded an aerial photography company in the Bay Area with custom built drones to provide high end service at a lower cost than traditional airplane-based services
- Utilized a fleet of three in-house custom-built drones capable of carrying high definition cameras providing 30mb crystal clear photos, a feat impossible to achieve with an off the shelf solution at the time
- Completed jobs with Real Estate Development, Brokerage, tech and Construction companies such as Google, Nvidia, Devcon and Sares Regis Group completing over 150 jobs
- Consulted with Google Security, exploring feasibility of using drones for Mountain View Campus traffic monitoring

# JACOB S. BORENSTEIN

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 - 2021

*Master of Science in Real Estate Candidate*

- Focus and Relevant Coursework: Real Estate Finance, Urban Economics and Commercial Development

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2016 - 2020

*Bachelor of Business Administration*

- Major: Finance, Investment Banking and Real Estate
- 

## PROFESSIONAL EXPERIENCE

**Brennan Investment Group, Chicago, IL** 05/19 - 08/19

*Acquisitions/Leasing Intern*

- Analyzed Midwest Portfolio of 224 buildings focusing on rent growth and retention. Presented findings to the CEO leading to new investment strategies, targeting places with high rent growth and tenant retention
- Assessed potential investments by using Argus and Excel to find acquisition price within investment parameters
- Gained valuable knowledge of leasing side of real estate by accompanying co-workers at on site tours and leasing meetings

**Fourscore Resource Capital LLC, Minneapolis, MN** 06/17 - 08/18

*Data Manager*

- Formulated techniques for quality data collection by using excel to ensure accuracy and legitimacy of data
- Organized more than 10,000 documents implementing an efficient and secure procedure for data management and analysis by double checking data entry with a co-worker
- Created excel spreadsheets identifying property details including square footage of suites, lease contracts and tenant information to increase efficiency in pulling reports and extracting needed data
- Streamlined property management activities by utilizing Rent Manager Property Management Software

**Otto's Liquor Store, Bloomington, MN** 05/17 - 08/17

*Sales Associate*

- Operated cash register, conducted inventory, and stocked shelves to make sure store was running smoothly
  - Trained and supervised three other employees in operating cash register, conducting inventory, and stocking shelves
  - Assisted customers while maintaining an easy to navigate and clean shopping center
- 

## LEADERSHIP EXPERIENCE/COMMUNITY ACTIVITIES

**Badger Business Professionals (BBP)** 09/16 - 05/17

*Member*

- Develop fundamental business skills including leadership, networking, and business etiquette
- Dedicated time during month to learn from corporate speakers, learning the intricacies of different businesses
- Volunteer for two hours per month assisting community organizations with pressing needs

**Student Alliance for Israel (SAFI)** 09/16 - 05/17

*Ambassador*

- Recruited over 25 members to join SAFI
- Coordinated a team of three to take on organizing events, delegated certain tasks to team members so event runs steadily

**Zeta Beta Tau - Alpha Kappa Social Fraternity** 09/16 - 05/20

*Associate Member*

- Attend weekly chapter meetings
  - Cultivated life-long relationships with other brothers
  - Planned and participated in social events with sororities, working as a team with other brothers to run events well
  - Fundraised over \$100,000 through Humorology, a musical/variety show, money donated to Children's Hospital
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## TECHNICAL SKILLS

- Proficient in Argus and Excel

# RYAN CONNER

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## PROFILE

*A collaborative, consensus-building executive with unique expertise in developing lasting relationships built upon trust. Able to create new partnerships to achieve growth goals. Disciplined, organized, focused initiator who delivers outcomes on time. Enrolled in the UW-Madison Master's in Real Estate program to gain a foundational knowledge base to allow for a transition from equity capital markets to real estate. Desired career path is currently focused on real estate investment and/or development.*

## EDUCATION

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**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 - 2021  
*Master of Science in Real Estate Candidate*

- Key Coursework: Commercial Real Estate Development, Real Estate Finance, Real Estate Valuation, Urban Economics, Excel and Argus Modeling

**University of Notre Dame, Notre Dame, IN** 2002 - 2006  
*Bachelor of Business Administration*

- Major: Finance

## PROFESSIONAL EXPERIENCE

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**KLCM Advisors Inc., Milwaukee, WI** 03/18 - 08/20  
*Vice President – Client Services*

- Directed new business development effort within a growing pipeline of client opportunities via partnership with Charles Schwab. Developed foundational relationship with 70-80 Schwab financial consultants. Managed 20 new client portfolios valued at \$20-25 million. Guided a balanced, incremental new client portfolio transition process with colleagues
- Conducted 10-15 calls/meetings with Schwab consultants, prospective clients and clients per week to offer updates on capital markets and discuss firm's customized investment approach. Effort generated recurring engagement, 90%+ client retention and five new referrals per month from Schwab partners
- Influenced investment committee with ideas for portfolio construction process. Monitored relevant investment research on publicly traded companies. Delivered market views and stock recommendations to fit investment strategy. Collaborative portfolio construction benefited firm as performance gap versus benchmark narrowed by 10% during pandemic
- Spearheaded writing of quarterly client letters and essays to highlight relevant market commentary and foster engagement. Communications were crafted to educate and engage clients; partners delegated responsibility given concise writing style
- Executed strategic overhaul of ineffective website, produced refreshed marketing material for client/prospective client presentations, and crafted regular updates to firm's blog to discuss relevant topics. Schwab partners noticed effort to modernize firm's client-facing approach and referral opportunities improved by 10% in subsequent months
- Mobilized financial planning effort (MoneyGuide Pro) for clients to understand how their money can work during retirement. Financial planning tool became a client retention tool by showcasing a customized roadmap for achieving goals

**Robert W. Baird & Co., Milwaukee, WI**  
*Vice President – Institutional Equities* 02/12 - 02/18  
*Institutional Investment Officer* 07/06 - 01/12

- Co-managed Southeast territory for six years following promotion to Vice President. Territory grew from eight to 20+ institutional accounts managing \$125 billion in equity assets as new relationships were established and developed. Annual revenue grew from \$2 million to \$3-3.5 million and held steady despite outflows from actively managed equity portfolios
- Cultivated lasting relationships with analysts and portfolio managers who used Baird's top-rated equity research. Formulated actionable investment ideas for asset managers engaged in security selection. Earned consistent #1 ranking from Greenwich Assoc. survey for research importance, sales and service quality among small- and mid-cap research shops
- Maintained #1 ranking at four key accounts, top five ranking at another six accounts. Conducted periodic strategic account reviews with clients to assess research and sales teams' effectiveness; implemented specific action plans to address areas for improvement of sales and research effort; often resulted in 10%+ growth in commissions and a higher vote ranking
- Initiated efforts to promote impactful engagement between research and institutional sales to better deliver consistent product and information flow to institutional clients, primarily via written communications. Goal was achieved as sales and research rankings with key accounts improved over a four-quarter period leading to 5-10% higher commissions for firm

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## TECHNICAL SKILLS & PROFESSIONAL CREDENTIALS

- Microsoft Office Suite, Bloomberg, Excel and Argus
- Professional Licenses: Series 7 and 63
- ICSC Online Retail Real Estate Institute Certificate for Students (completed July 2020)

# TIANYI DING

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## PROFILE

*Current Masters of Science in Real Estate candidate with background in shopping centers/apartments management. Creative data/technology user for problem solving with six years' experience in marketing, leasing and property management. Aims to leverage past experience and technical expertise to make tangible impact in communities through real estate (re)development, management and investment.*

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021

*Master of Science in Real Estate Candidate*

- Coursework Highlights: Real Estate Finance, Real Estate Valuation, Urban Economics, Commercial Real Estate Development, REITs Research and Portfolio Management

**Nanyang Technological University, Singapore** 2006 – 2012

*Bachelor of Engineering in Computer Science*

- Major: Business and Computing
- Minor: Entrepreneurship

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## PROFESSIONAL EXPERIENCE

**CEC Optics Valley Union Group Co Ltd, Wuhan, China** 04/18 – 04/19

*Property Manager, Head of Commercial Property Management Department*

- Coordinated and lead cross-functional teams in the repurposing of over 80,000 sf of class C vacant office properties, produced positive cash flow.
- Initiated and implemented refined traffic flow adjustment for shopping center, improved customer traffic and bolstered leasing competitiveness.
- Restructured incentives for the in-house Customer Service Team resulting in higher customer satisfaction.
- Established new leasing strategies for shopping center creating an improved tenant mix with more emphasis on experience-oriented tenants.
- Headed Commercial Property Management Department, and exceeded target rent collection by 35% despite challenging economic conditions and locational disadvantages. Awarded Best Performing Department by end of 2018.

**CEC Optics Valley Union Group Co Ltd, Wuhan, China** 11/13 – 04/18

*Associate Property Manager and Leasing Representative*

- Managed the shopping center and artist studios/apartment in Wuhan Creative Capital, the largest art and cultural industrial park in China.
- Established contacts with over 300 business owners and maintained great tenant relationship with more than 80 retailers for open-air shopping center, particularly in F&B, education, arts and entertainment.
- Achieved over 87% shopping center occupancy with leasing team, despite fierce competition from online shopping and center's locational disadvantage.
- Maintained open communication with retailers. Consistently documented and updated retailers' store audits and financial performance. Consulted and helped retailers with permitting, marketing, hiring and other operational issues.
- Launched creative joint promotional events and marketing programs through close collaboration with marketing and tech team. Improved overall sales performance and retailer satisfaction.
- Reached out and collaborated with over 100 artist individuals/groups, both local and international. Converted over 70 artists to be long-term tenants in artist studios/apartments.
- Took leadership role in planning and execution of First Wuhan International Arts Festival in 2014.
- Founded "Wuhan Creative Market", a seasonal festival where local artists, curators, performers, retailers and artisans all come together to present a unique experience. "Wuhan Creative Market" was recognized by local municipality as one part of Official Campaign for Wuhan's application for UNESCO Cities of Design in 2017.
- Applied for annual government financial aid in arts and cultural events to support company's marketing campaigns, saved over \$85,000 in marketing expenses annually.

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## TECHNICAL SKILLS

- Proficient in Object-Oriented programming, such as Java and C#.
- Proficient in Excel and Argus.

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## INTERESTS

- CrossFit and weightlifting

# CASEY DYNAN

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## PROFILE

Innovative professional with experience and success across multiple spaces: business, construction, non-profit, politics, and athletics. Currently a graduate student studying Real Estate at the University of Wisconsin-Madison using business school to pivot into commercial real estate development. Actively seeking opportunities in real estate development across multiple markets in the U.S.

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## EDUCATION

<b>University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI</b> <i>Master of Science in Real Estate and Urban Land Economics Candidate</i>	<b>2020 - 2021</b>
<b>Gustavus Adolphus College, St. Peter, MN</b> <i>Bachelor of Arts in Business Management – Magna Cum Laude</i>	<b>2007 - 2009</b>

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## PROFESSIONAL EXPERIENCE

<b>North Companies, Maple Plain, MN</b> <i>President</i> <ul style="list-style-type: none"><li>Executed commercial, residential, concrete, hardscape, and waterproofing construction independently or as a contractor</li><li>Coordinated and executed project design, planning, estimation, project management, project delivery, and customer relations</li></ul>	<b>2017 - 2020</b>
<b>Freedom Club, Plymouth, MN</b> <i>Political Director</i> <ul style="list-style-type: none"><li>Worked alongside Executive Director on several statewide initiatives and campaigns</li><li>Executed political fundraising and relationship building with top business, industry, and political leaders of Minnesota</li><li>Gained vital experience into the inner workings of local politics and public policy</li></ul>	<b>2018</b>
<b>Youth Investment Foundation, Medina, MN</b> <i>Vice President</i> <ul style="list-style-type: none"><li>Identified and developed new organizational opportunities and partnerships</li><li>Directed and co-directed various leadership conferences and trainings nationally</li><li>Delivered dynamic public speaking engagements nationally</li></ul>	<b>2015 - 2017</b>
<b>St. Paul's Outreach, West St. Paul, MN</b> <i>Men's National Program Director</i> <ul style="list-style-type: none"><li>Involved in overseeing, leading, advising, training, developing strong men's leaders and men's environments nationally</li><li>Planned and executed retreats, keynote talks, and events nationally</li><li>Directly managed eight full-time staff and a team of 15 student-leaders</li><li>Oversaw our household co-living communities at the University of Minnesota</li></ul>	<b>2010 - 2015</b>
<b>Brightpeak Financial, Minneapolis, MN</b> <i>Founder Emeritus &amp; Concept Originator</i> <ul style="list-style-type: none"><li>Founded a digital financial services company as an internal startup within the Fortune 500 financial services company Thrivent Financial</li><li>Brightpeak originated from my capstone marketing research project at Gustavus and grew to roughly 100 employees over 10 years</li></ul>	<b>2009</b>

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## ADDITIONAL INFORMATION

Skills: *Leadership, Public Speaking, Vision Casting, Creativity & Ideation, Entrepreneurship, and Fundraising*

Professional Associations: *NAIOP*

Relevant Coursework: *Real Estate Finance, Real Estate Valuation, Real Estate Excel Modeling, Argus Modeling, Urban Economics, Project Management, and Residential Property Development*

Professional Interests: *Real Estate Development (Multifamily, Institutional/Specialty, Mixed-Use, Hospitality, Industrial, and Office), Real Estate Technology, and affordable housing in urban areas*



# Rachel L. Govin

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**Education:** University of Wisconsin Law School *J.D. December 2002*  
University of Wisconsin- Madison *B.A. Journalism, May 2000*

**Licenses:** Wisconsin State Bar Association *(2003-present)*  
Wisconsin Real Estate Brokers License *(2014-present)*

**IA Management LLC, Madison, WI** *Chief Operating Officer & Corporate Counsel; October 2016-Present*

- Lead, supervise and direct all operational aspects of a real estate portfolio consisting of multifamily, multi-tenant office, single tenant office, retail and industrial (residential and commercial leasing, management, facilities, accounting, human resources, marketing, and informational technology)
- With the leadership team, drive the overall growth strategy and success of the organization. Identify, create, prioritize objectives, and oversee their implementation
- Review all company operating systems and efficiency strategies and implement needed adjustments or improvements
- Report monthly to the Executive Committee all critical business decisions, major deviations from business plans, and potential revisions to key operating strategies/guidelines
- Create and institutionalize company operating strategies, plans and procedures
- Actively participate in budgeting, capital planning, staffing, requirements and recruiting
- Establish policies that promote company vision and culture

**Fiduciary Real Estate Development, Inc., Madison, WI** *Regional Supervisor; April 2013-September 2016*

- Provide guidance, support and act as a liaison between various departments to ensure the achievement of the strategic goals of the company
- Responsible for the hiring, training and supervision of property managers, leasing staff and maintenance personnel
- Prepare annual budgets and daily, weekly and monthly financial and marketing reports
- Responsible for all aspects of the development and management of over 1000 residential rental units in Wisconsin and Minnesota
- Monitor pending and passed legislation at federal, state and local levels and ensure that company forms and policies comply with the changing legislation

**Madison Property Management, Inc., Madison, WI** *Corporate Counsel; December 2008-April 2013*

- Negotiate master contracts with third party vendors for software, maintenance, construction and professional services
- Provide advice to the executive team regarding legal issues and business strategies.
- Draft legal documents and company forms including employee documents, residential and commercial contracts and addenda, legal notices to residents and property management agreements
- Responsible for legal representation in evictions, small claims cases, large claims cases and administrative hearings
- Monitor pending and passed legislation at federal, state and local levels and ensure that company forms and policies comply with the changing legislation

**Sipsma, Hahn & Brophy L.L.C., Madison, WI** *Associate Attorney; July 2006-November 2008*

- Responsible for litigation of plaintiff and defense civil cases including family law, collections, landlord-tenant, personal injury, medical malpractice, breach of contract, subrogation, collections, probate and construction issues
- Assistant senior attorneys with legal research, document preparation and evidence gathering in insurance defense cases for clients throughout Wisconsin

**O'Neill, Schimmel, Quirk & Carroll, Milwaukee, WI** *Associate Attorney; April 2004- July 2006*

- Responsible for litigation and negotiation of subrogation cases for clients throughout Wisconsin
- Assistant senior attorneys with legal research, document preparation and evidence gathering in insurance defense cases for clients throughout Wisconsin
- Prosecution of Municipal Ordinance Violations in Wauwatosa Municipal Court and appeals in Milwaukee County Circuit Court

**Wagner, Falconer & Judd, Brookfield, WI** *Associate Attorney, April 2003-April 2004*

- Responsible for the litigation and negotiation of traffic and criminal defense cases for clients throughout Wisconsin
- Assistant senior attorneys with legal research, document preparation and evidence gathering in criminal and civil cases for clients throughout Wisconsin

**Volunteer Experience:**

Madison 56ers Soccer Club Board Member, Madison, WI

Volunteer Catechist-Holy Mother of Consolation Parish, Oregon, WI

# ERIC GUMM

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## PROFILE

*Strategic real estate development professional with 5+ years of experience in land acquisition and development of market-rate multifamily communities nationwide. Combines industry knowledge of site and market selection, land planning, commercial due diligence, and project entitlements to create development strategies that mitigate risk, leverage strengths, and maximize project returns.*

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## EDUCATION

University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI 2020 – 2021  
*Master of Science in Real Estate and Urban Land Economics Candidate*

- Key Coursework: Applied Real Estate Investment Track (AREIT) managing healthcare, self-storage, and manufactured housing sectors

University of Wisconsin-Madison, College of Agriculture and Life Sciences, Madison, WI 2008 – 2014  
*Bachelor of Science (BS)*

- Major(s): Landscape Architecture, Environmental Sciences

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## PROFESSIONAL EXPERIENCE

Continental Properties Company, Inc., Menomonee Falls, WI June 2015 – Present  
*Development Director*

- Lead a 4-person development team to complete due diligence, entitlements, and approvals for new multifamily developments, totaling 5 rezones, 2,604 units, and \$529MM in development costs to date
- Manage \$9.34MM of pursuit costs consisting of earnest money and consultant fees
- Analyze market research data to identify potential development locations in 10 markets across AZ, CO, NV, TN, and TX
- Perform financial analysis to determine viability, profitability, and revenue projections of 10 new multifamily developments
- Negotiate (i) business terms of Letter of Intent and Offer to Purchase Agreements with land sellers and (ii) CC&R, Development, Annexation, TIF, Cost Sharing, and Easement Agreements with developers, municipalities, and utility providers

*Development Associate* October 2016 – June 2018

- Completed all due diligence, entitlements, zoning, and approvals from applicable local, state, and federal agencies for 4 multifamily communities, totaling 1,008 units and \$198.5 MM in development costs
- Managed \$4MM of pursuit costs that consisted of earnest money and consultant fees
- Negotiated contracts with 15+ project consultants, including engineers, architects, attorneys, and environmental consultants
- Obtained political support and municipal approvals from government boards/agencies, Plan Commissions, City Councils, and third-party stakeholders for rezones, land use plan amendments, and other project approvals
- Negotiated Development and Offer to Purchase agreements with land sellers, utility providers, and municipalities

*Land Planner* June 2015 – October 2016

- Created site plans for 40+ multifamily and retail development opportunities to optimize site carrying capacity, project costs, and profitability
- Completed due diligence on multifamily development projects, including zoning requirements, entitlement process, utility information, and other items required by lenders and private investors
- Reviewed ALTA surveys, Phase I ESA reports, and plats to ensure internal and lender requirement compliance

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## ACTIVITIES

National Multifamily Housing Council (NMHC) February 2020 – Present  
*Emerging Leader*

- Attend networking events and mentoring sessions with top multifamily industry leaders
- Create advocacy materials used in discussions with HUD outlining (i) site constraints that make ADA compliance difficult and (ii) entitlement constraints that lead to increased construction costs and lack of affordable housing

Brew City Real Estate Investors Club January 2019 – Present  
*Member*

- Attend networking events with local, private real estate investors, owners, and operators in Milwaukee

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## TECHNICAL SKILLS

- Microsoft Excel, Argus

# CLAUDIA HARKINS

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021

*Master of Science in Real Estate Candidate*

- Key Coursework: Commercial Property Development, Urban Economics, Investment Analysis and Presentation and Private Equity Track

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2016 – 2020

*Bachelor of Business Administration*

- Majors: Real Estate and Entrepreneurship
- GPA: 3.75

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## PROFESSIONAL EXPERIENCE

**Dane Workforce Housing Fund, Madison, WI** 06/20 – Present

*Intern*

- Analyze possible investment properties and developers to aid in accepting or rejecting fund decisions.
- Complete financial analysis to conclude profitability and risk of investment metrics such as DSCR and ROI.
- Conduct due diligence on projects and develop summary report for fund managers to evaluate.

**The Alexander Company, Madison, WI** 05/19 – 08/19

*Real Estate Development Intern*

- Evaluated and abstracted retail and office leases and completed site due diligence to determine an appropriate acquisition price for a potential new development project.
- Conducted numerous market studies in locations across the U.S. to analyze comparable rents for a subject property.
- Marketed, sold, and drafted WB-14 forms for six condominium storage units generating over \$9,000 of income for the company, in collaboration with title companies, easement holders, and buyers.

**University of Wisconsin-Madison Business School, Madison, WI** 06/18 – 07/18

*Business Emerging Leaders (BEL) Program Residential Mentor*

- Managed 22 BEL high school students who stay at UW-Madison for three weeks to take business courses, ACT prep classes, and build relationships with one another in pursuit of a full ride scholarship if accepted into the university.
- Led nightly events centered on building community, academic skills, personal growth and career knowledge.
- Mentored underrepresented and first-generation students who strive to bring their diverse perspectives and work ethic to the Wisconsin School of Business.

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## TECHNICAL SKILLS

- Argus, Microsoft Modeling/Software (Excel, PowerPoint, Word)

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## ACTIVITIES

**Real Estate Club** 02/18 – Present

- As an active member, network with professionals in the Real Estate industry to gain insight on concepts such as development, debt markets, REITs, green building, and institutional trends across the field.
- Engage with real estate students in the organization to exchange ideas to better understand the industry.
- Analyze current industry trends, real estate professions, and divisions based on panel discussions.

**Women in Business** 02/17 – 05/20

*Community Involvement Director, Mentor*

- Implemented four community involvement events through both new and established connections in the community to allow women in the organization to become active members in the community and the business field.
- Contributed to community and organization fundraising events, professional development sessions and social events.
- Leveraged connections with women who are in the Wisconsin School of Business to form a support system.

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## ADDITIONAL INFORMATION

- Certificates: Licensed Wisconsin Real Estate Salesperson (August 2018)
- Interests: Private Equity, Commercial Development of Affordable Housing and Mixed-Use properties

# SAM JAGODZINSKI

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021  
*Master of Science in Real Estate Candidate AREIT and Private Equity Tracks*

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2012 – 2016  
*Bachelor of Business Administration (BBA)*

- Major: Real Estate and Urban Land Economics; Marketing; History 3.8/4.0
- Graduated with Distinction

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## PROFESSIONAL EXPERIENCE

**Stepping Stone Homes | Home Path Financial, Brookfield WI** 07/19 – Present

*Project Manager*

- Underwrite all new land development transactions building Pro Forms for 10+ properties per month
- Collect and compile sales, rents, and demographics in databases to create most accurate forward-looking projections
- Evaluate and report on property and construction performance relative to budgets and investment targets for five projects worth over \$10 million
- Coordinate municipal approval and permitting process timeline to target maximum efficiency and reduce timelines
- Built a scalable land vetting process used by an interdisciplinary team on over 35 candidate properties based on return targets, construction costs, and market environment to concentrate resources on most promising opportunities
- Lead a cross-functional team in with coordinating with company founders, engineers, capital markets, purchasing, and sales as second employee in practice area

**Blueprint Healthcare Real Estate Advisors, Chicago, IL** 07/16 – 07/19

*Analyst | Market Research Lead*

- Analyzed property performance through underwriting financial statements in tandem with forward-looking market research collaborating closely with a team of 25 analysts, associates, and company leadership
- Built Pro Forma projections forecasting portfolio and single-asset performance on over 300 assets
- Led market research function assessing real estate sites in terms of demographics, geography, labor pool, property tax rate, and regulatory environments of over 150 transactions worth over \$3 billion directly reporting to senior management
- Developed an internal market information function taking market intelligence (i.e. sales comparables, market trends, webinar content, investor presentations etc.) and proliferating very concisely across all levels of company
- Created advanced market databases to forecast market sentiment and strategy; guided a team of six to implement
- Monitored asset performance over time and led due diligence working closely with third-party clients
- Formulated and implemented strategies to maximize value, financial and otherwise, communicating closely with clients
- Prepared over 100 offering memorandums with meticulous attention to detail
- Co-facilitated overhaul of internship program and curriculum speeding up learning curve of four new interns
- Developed investment presentations collaborating with top company leadership to inform clients and prospect for business

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## SKILLS

- Proficient in Microsoft Excel, ARGUS, Word, PowerPoint, Access, GIS, SPSS, Tableau, CoStar, Sitewise, Corelogic, Yardi, SQL

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## ACTIVITIES

- Wisconsin Real Estate Alumni Association (01/2014 – Present) Active member
- Wisconsin Alumni Association (01/2017 – Present) Admission volunteer
- Literacy Services of Wisconsin (01/2020 – Present) Literacy tutor

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## AWARDS

- Recipient of the Richard Ratcliff Scholarship for excellence in real estate coursework (2015)
- Recipient of the Curt Culver Scholarship for excellence in real estate and service (2014)
- FBLA National Champion (Ranked 1 out of over 11,000) in Category of Business Procedures (2012)
- FBLA National Campion (Ranked 1 out of over 8,500) in category of Sports Management (2011)

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## INTERESTS

- Mountain biking, fishing, rock climbing, sports analytics

# BRADLEY JOSEPH JOHNSON

(414) 469-9911 • linkedin.com/in/bradley-j-johnson • bjjohnson24@wisc.edu

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021  
*Master of Science in Real Estate and Urban Land Economics Candidate*

- Private Equity Track
- Key Coursework: Real Estate Finance, Real Estate Private Equity, Real Estate Valuation, Commercial Real Estate Development, Real Estate ARGUS Modeling, Real Estate Excel Modeling, Urban Economics

**Oklahoma State University, Stillwater, OK** 2015 – 2018  
*Bachelor of Science in Business Administration*

- Major: Finance & Entrepreneurship
- Dean's Honor Roll (3x)
- Institutional GPA: 3.5

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## PROFESSIONAL EXPERIENCE

**U.S. Bancorp Global Fund Services, Milwaukee, WI** 01/19 – 08/20  
*Alternative Investments Associate*

- Completed associate work for 13 different private equity and hedge fund portfolios with over \$1 billion assets under management.
- Performed extensive accounting analysis on trial balances, cash flow statements, income statements, and balance sheets in order to examine fund, investment, and investor valuations.
- Generated quarterly investor statements and executed capital calls and distribution processing for clients.
- Produced and processed wire authorizations for fund's needs.
- Communicated with clients to quickly troubleshoot any reporting issues.

**First National Bank of River Falls, River Falls, WI** 05/16 – 07/16  
*Marketing Assistant - Intern*

- Generated marketing strategies based on past results to yield a higher prospective client conversion rate.
- Created a pamphlet to educate young students on financial literacy.
- Collaborated with various companies in River Falls area on marketing campaigns.
- Managed the bank's social media accounts and taught several employees how to properly utilize social media.

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## ACTIVITIES

**Oklahoma State University - Stillwater** 08/15 – 06/18  
*Student-Athlete*

- Aided in leading my event group as captain of the track & field team.

**University of Minnesota – Twin Cities** 08/13 – 06/15  
*Student-Athlete*

**Boys & Girls Clubs of the Twin Cities** 03/15 – 06/15  
*Volunteer*

- Provided underprivileged students with additional guidance to succeed in the classroom.

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## HONORS

**U.S. Track & Field and Cross Country Coaches Association** 2016-2017  
*All-Academic (2x)*

- Obtained 3.25+ cumulative GPA while finishing season ranked 4<sup>th</sup> nationally in my indoor relay event and participating in the 2017 NCAA Division I Track & Field Championships.

**National Collegiate Athletic Association** 2017  
*First Team All-American*

- One of top 8 overall finishers nationally to conclude 2017 NCAA indoor track and field season.

**Big 12 Conference** 2017  
*Academic All-Big 12*

- Maintained 3.20+ yearly cumulative GPA at Oklahoma State with over 60% in-season participation in sport.

# JUSTIN KLOEHN

(920) 419-4270 • linkedin.com/in/justinkloehn • justinkloehn@gmail.com

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## PROFILE

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*MSRE candidate with solid financial analysis and negotiation skills combined with a unique ability to create and develop strong relationships.*

## EDUCATION

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**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021

*Master of Science in Real Estate Candidate*

- Applied Real Estate Investment Track (AREIT)
- Key Coursework: Real Estate Finance, Valuation, Urban Economics, Commercial Development, Excel, and Argus Modeling

**University of Wisconsin-Madison, Madison, WI** 2016 – 2020

*Bachelor of Business Administration*

- Majors: Finance, Investment, & Banking; Management

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## PROFESSIONAL EXPERIENCE

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**Sett Recreation – Union South, Madison, WI** 09/16 – 05/20

*Supervisor*

- Led a consulting team while partnering with management to identify ways to decrease costs 10% and boost revenues 5%
- Customer service focused supervisor intent on leading and mentoring colleagues.
- Conducted precise money transactions and performed nightly closeout procedures including cash counts

**Avis – Midwestern Wheels, Appleton, WI / Madison, WI** 05/17 – 01/20

*Rental Sales Agent*

- Negotiated rental contracts with customers and earned company top performer award for July 2018
- Exceeded sales goals through upsells, insurance coverages, and optional services boosting location sales revenue by 10%
- Trained 5+ new employees using one-on-one coaching sessions leading to each trainee significantly exceeding sales goals

**Walgreens, Appleton, WI / Madison, WI** 08/15 – 01/17

*Customer Service Associate*

- Addressed customer needs while fostering positive relationships in a store generating more than \$40,000 of daily revenue
- Logged accurate inventory daily and ordered more inventory when required reducing stock shortages
- Completed daily close out procedures and cash counts with focus on workflow efficiency and financial accuracy

**Weed Man Lawn Care, Appleton, WI** 01/14 – 05/16

*Marketing Representative*

- Conducted door-to-door sales promoting seasonal lawn care service contracts to 60-100 residences per night
- Demonstrated a unique ability to quickly build rapport and sell services while overcoming initial rejection
- Assessed individual customer needs and identified programs to fit budget concerns increasing customer retention by 10%

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## TECHNICAL SKILLS

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- Microsoft Excel, Asset Valuation, Regression Analysis, Financial Modeling, ARGUS

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## ACTIVITIES

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**Portfolio Management Club** 09/18 – 05/20

*Vice President of Finance*

- Led organization of 30+ students while providing professional mentorship and technical analysis training
- Facilitated a Market Watch portfolio simulation maintaining portfolio of stocks, ETFs, REITs with over 15% annual returns
- Created and delivered presentations on topics including stock trading, mutual funds, banking, and valuations

**Business, Badgers, & Beyond** 09/16 – 05/20

*Premier Member*

- Volunteered 100+ hours within the Madison community for organizations including Wisconsin Public Television, Henry Vilas Zoo, Porchlight, and the Wisconsin Institute for Discovery while raising over \$50,000 through auctions and phone banks

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## CERTIFICATIONS

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- Microsoft Excel Now! Proficiency Course

# CAROLINE KRONER

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## PROFILE

*MS in Real Estate candidate at the University of Wisconsin-Madison with strong communication skills, an education in finance, and experience in property management and development.*

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021

*Master of Science in Real Estate Candidate*

- Key Coursework: Real Estate Finance, Commercial Real Estate Development, Urban Economics, Real Estate Valuation, Excel and ARGUS Modeling

**University of Wisconsin-Madison, Madison, WI** 2017 – 2020

*Bachelor of Business Administration*

- Major: Finance, Investment and Banking
- GPA: 3.956/4.0 (Dean's List, six semesters)

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## PROFESSIONAL EXPERIENCE

**UW-Madison Office of Student Financial Aid, Madison, WI** 02/19 – Present

*Loan Processing Specialist*

- Evaluate tasks to ensure compliance with laws, lenders' policies, and the Department of Education's guidelines, regulations, and procedures
- Manage and review queries to ensure loans are ready to be processed and to fix errors
- Navigate a variety of databases to compile student information in order to process private loans
- Collaborate with a team to problem-solve issues with unique student or parent applications
- Maintain email and phone communications with students and parents to process requests for various loans

**FORE Development and Investment Group, Appleton, WI** 07/20 – 08/20

*Summer Intern*

- Analyzed demand, rental rates, and vacancy by conducting research on specific market and property types
- Led tours for prospective tenants of the 33-unit Avant Apartments during construction and lease-up mode

**Guardian Life Insurance Company of America, Appleton, WI** 06/19 – 08/19

*Underwriting Intern*

- Performed renewal and new business underwriting duties within the North Division Core team responsible for \$500M of group insurance premium for 2-499 life employer groups
- Analyzed persistency trends and weekly targets for various broker partners and regions
- Conducted ad hoc projects such as coding plans and clean-up within a mainframe system
- Maintained effective communication with colleagues and interns to facilitate nationwide collaboration by using Skype for Business and email

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## TECHNICAL SKILLS

- Microsoft Office (including Excel, Word, PowerPoint, Outlook)
- ARGUS Modeling

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## ACTIVITIES

**Women in Real Estate** 01/20 – Present

*Member*

- Assists in building a welcoming environment for women interested in real estate
- Participates in social and professional events in order to learn about careers in real estate and build relationships with current and future real estate professionals

**Real Estate Club** 09/19 – Present

*Member*

- Attends meetings in order to network with fellow real estate students and learn about industry opportunities

**BadgerSPILL** 01/18 – Present

*Supporter*

- Responds to student requests for advice via email and provides resources to members of the UW-Madison community in order to supply support needed
- Creates a positive impact within the community through customer service and helping students in need



# TYLER KRUPP

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## PROFILE

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Social entrepreneur and small business founder with a background in organizational culture building and academic philosophy, seeking an opportunity in the field of real estate development to build ecologically sustainable, economically affordable and culturally connected communities of care in urban environments.

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## EDUCATION

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**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** **2020 - 2021**  
*Master of Science in Real Estate Candidate*

**University of California, Berkeley, CA** **2008 - 2020**  
*PhD Candidate (ABD) in Political Science*

**University of California, Berkeley, CA** **2002 - 2007**  
*Master of Arts in Political Science (2007)*

**University of Wisconsin, Madison, WI** **1997 - 2002**  
*Bachelor of Arts in Political Science*

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## PROFESSIONAL EXPERIENCE

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**Prime Urban Properties, Madison, WI** **01/20 - 08/20**  
*Intern, Real Estate Development*

- Apprenticed under direct supervision of president and head developer.
- Learning all aspects of development process. Followed development process from beginning to end for three separate projects (300+ residential units, 8000 SF commercial space.)

**Thinking Allowed, San Francisco, CA** **01/09 - 08/20**  
*Founder and Interviewer, Film Production Company*

- Interviewed 30 + thinkers in eight cities across globe.
- Managed five person team in all aspects of filming.
- Interviews were featured for 10 weeks in New York Times Philosopher's Stone:  
<http://opinionator.blogs.nytimes.com/author/tyler-krupp/>

**Tilden Preparatory High School, Sausalito, CA** **08/19 - 06/20**  
*Humanities Instructor*

- Taught accelerated high school students across entire humanities curriculum.

**Zazen, San Francisco, CA** **01/10 - 01/18**  
*Founder/Owner/Manager*

- Founded and managed an interfaith wellness center leading 30 + employees across three locations.
- Responsible for all aspects of operation, including leasing, construction management, hiring, accounting, marketing, social media, website maintenance, newsletter, customer service, day-to-day management, programming, event planning community relations.
- Grew organization from zero to \$1.0 million + annual sales and 15,000 clients.
- Achieved 4.5/5 star rating on yelp (160+ reviews).

**University of California, Berkeley, CA** **01/05 - 01/18**  
*Graduate Student Instructor*

- Led small Socratic seminars of 10-25 students in humanities at UC-Berkeley and Yale University for 21 separate semesters.
- Collaborated with senior professors, edited work, wrote draft letters of recommendation for students.
- Received exceptional student evaluations and teaching recommendations.

# JACK DENNIS LAUDON

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## PROFILE

*Dedicated student of Real Estate and current Master of Science candidate in Real Estate at the University of Wisconsin. Prided on a dogged work ethic and sincere desire to advance within the Real Estate industry. Upon completion of his master's degree, he intends to incorporate his professional and educational experiences at a development position with a company which specializes in socially and economically feasible developments.*

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021  
*Master of Science in Real Estate Candidate*

**University of St. Thomas, St. Paul, MN** 2015 – 2019  
*Bachelor of Arts in Financial Management & Bachelor of Science in Real Estate*

- Major: Financial Management & Real Estate
- GPA: 3.32
- Studied abroad twice (Rome 2019 & London 2018)

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## PROFESSIONAL EXPERIENCE

**Newmark Knight Frank, Minneapolis, MN** 08/19 – 04/20  
*Analyst - Valuation & Advisory*

- Valued various property types including office, retail, industrial, multi-family, student-housing, and mixed-use using the Sales, Cost, and Income approaches to value.
- Analyzed subject property information such as lease agreements, sale and purchase agreements, rent rolls, operating historical information and budget information.
- Assisted on approximately 60 appraisal reports as a member of the Retail and Industrial/Litigation team.
- Researched and wrote overviews for real estate trends using Moody's, CoStar, REIS, and Investor Surveys.

**NAIOP Minnesota 2019 University Real Estate Challenge, Minneapolis, MN** 01/19 – 03/19  
*Competitor/Presenter*

- Designed and pitched a deal to potential investors for the NAIOP Minnesota 2019 Real Estate Challenge.
- Built a development plan, construction timeline, budget, pro forma, leasing plan, financing plan, market analysis, and 10-year Cash Flow based on our development.
- Assessed local economies for feasible design concepts and possible retail tenants.

**Weyco Group, Milwaukee, WI** 05/17 – 08/17  
*Accounting Intern*

- Processed payments and issued credits to accounts receivable for approximately 30 clients.
- Prepared Gross Margin and Inventory reports at month end for the Executive Suite.
- Established a budget for allowable discounts for 10 national clients including Kohls, Men's Warehouse, and Macy's.
- Identified and rectified misapplied payments and prepared adjustments when necessary.

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## TECHNICAL SKILLS

- Microsoft Suite, Argus, CoStar, Redi Comps, Moody's, REIS

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## COMMUNITY INVOLVEMENT

**Salvation Army: Echelon MSP Chapter** 11/19 - 07/20  
*Service Member*

- Volunteered and networked at community outreach activities such as Salvation Army Ride for Australian Bush Fires, Senior Night Bingo, and Evening with Echelon Fundraising Formal.
- Engaged with other young professionals as well as local CEOs and executives to discuss professional and philanthropic careers.

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## ACTIVITIES

**KUST – University of St. Thomas Radio Station** 09/15 – 05/19  
*Radio Host & Intern*

- Hosted a radio show, trained and managed incoming club members, and organized on-campus music events.
- Spearheaded a marketing campaign to increase KUST's club presence on campus.
- Facilitated on-campus concerts, interacting with 3 executives at St. Thomas and student performance groups.

# SAMUEL L. MARKIN

(847) 323-0567 • <https://www.linkedin.com/in/sam-markin/> • Sam.Markin12@gmail.com

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## EDUCATION

### University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI

08/2020 – 05/2021

*Real Estate Master of Science 2021 Candidate – Real Estate Development and Urban Land Economics – Private Equity Track*

- Key Coursework: Argus Modeling, Excel Modeling, Real Estate Finance, Real Estate Valuation, Commercial Development, Urban and Regional Economics, Real Estate Capital Markets, Project Management
- Real Estate Private Equity Track: Nine credits devoted to working with teammates to analyze and recommend investment opportunities to an appointed investment committee (\$3M+ equity raise)

### Colorado College, Colorado Springs, CO

08/2014 – 05/2018

*Bachelor of Arts*

- Major: Economics and Business
- GPA: In Major: 3.6/4.0 Aggregate: 3.5/4.0

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## PROFESSIONAL EXPERIENCE

### Bond Companies, Chicago, IL

11/2019 – 08/2020

*Associate - Real Estate Investment, Management, and Development*

- Active role in the day to day accounting responsibilities of the Bond RE Management company: accounts payable, accounts receivable, bank reconciliations, budgets, financial statements, taxes, filing fees.
- Execute tasks in connection with multifamily development projects: OAC meetings, OM decks, comparative bid analyses, vendor sourcing, construction/preconstruction draws, additional research as required.
- Investor Relations: Monitor the investor portal, respond to inquiries, edit and send out investor updates and K-1s.

### IRC Retail Centers, Oak Brook, IL

11/2018 – 11/2019

*Leasing Associate – Retail Real Estate Management, Acquisitions, Development*

- A primary contact for renewal and new lease negotiations across the Illinois portfolio of 59 properties
- Responsible for strategically sourcing and vetting new small-shop leads (<15,000sf) using a variety of methods, ultimately resulting in 100,000 square feet of new leases at our assets in 2019
- Maintained market intelligence and comparative market analysis for a portfolio of properties
- Served as a primary contact for new ancillary income initiative. Worked in conjunction with another leasing representative to carry inquiries through to executed agreements. Achieved \$1M in ancillary income first year of implementation (2019)

### Braden Real Estate, Chicago, IL

06/2018 – 09/2018

*Leasing Intern - A full service commercial real estate firm. Brokerage, Acquisitions, Development*

- Sourced leads and began negotiations with prospective retail tenants in conjunction with several brand-new retail and mixed-Use developments
- Maintained status reports relating to leasing progress for multiple developments and took the lead in meetings involving partner developers

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## TECHNICAL SKILLS

- Microsoft Excel, Argus, PowerPoint

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## ACTIVITIES

### Wisconsin Real Estate Club

2020-2021

- Active Member, attending numerous speaker and networking events geared towards sharing insights, building connections, and staying up to date with latest industry knowledge

### Colorado College Men's Varsity Soccer

2014 – 2018

- All Conference selection, Animal Award (Team Vote; Hungry play/ putting body on the line), Southwest Athletic Conference Honor Roll

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## ADDITIONAL INFORMATION

- **Licenses:** Real estate license in the state of Illinois. No. 475.184103

# EDUARDO WILLEM MONDRAGON SERRATOS

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## PROFILE

MS in Real Estate candidate with an international business background. Seeking an opportunity to leverage experience, working under pressure with multicultural peers and multilingual customers, to pursue a career in asset management.

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021

*Master of Science in Real Estate Candidate*

- Key Coursework: Commercial Property Development, RE Finance & Investment, RE Argus Modeling

**Grenoble Ecole de Management, Paris, France** 2016 – 2019

*Bachelor in International Business (Chargé d'Affaires Internationales)*

- Major: Entrepreneurship
- Overall Average Grade: 15.7/20 (A-/distinction awarded)

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## PROFESSIONAL EXPERIENCE

**The Kooples Diffusion, Galeries Lafayette, Paris, France** 05/18 – 07/18

*Sales Consultant*

- Ensured an exceptional, and personalized, service to an international clientele, in French, English, and Spanish.
- Helped colleagues reach sales targets, acting as a mediator with non-French speaking customers.

**Cuahtémoc Moctezuma brewery, Heineken, Toluca, Mexico** 05/17 – 08/17

*Logistics and Bottling Intern*

- Closed orders of bottled and canned products, expediting the workings of 'emergency' orders.
- Updated the Daily Control System, detailing workforce rotation, KPIs, and best practices.
- Developed a Skill Matrix for spotting the lack of technical skills in workstations and thus eliminating costly response times (av. 8 min.) due to mechanical failures.

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## ACTIVITIES

**Preparatory Department, Ural Federal University. Yekaterinburg, Russia** 2019 - 2020

- Successful completion of the two-semester university preparatory course *Russian as a foreign language* (Русский язык как иностранный).

**GSEM, Ural Federal University. Yekaterinburg, Russia** 11/18

- Participant at International Autumn School "Sustainable Business Development: Smart Future for All."
- Pursued sessions with business leaders to develop strategies for business creation and sustainable delivery.

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## TECHNICAL SKILLS

- MS Office, Argus

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## LANGUAGES

- Spanish – Native Speaker
- French – C1 (full working proficiency)
- Russian – B1 (limited working proficiency)

# ALAN PETERS

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## PROFILE

Experienced technical solutions professional with over 20 years' experience in real estate and civil engineering industry. History of delivering quality projects on time and budget while mitigating client risk. Outstanding communication skills with ability to learn quickly, develop effective interpersonal relationships, and lead a diverse team.

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## EDUCATION

- |  |                    |
|--|--------------------|
| <b>University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI</b><br><i>Master of Science in Real Estate and Urban Land Economics 2021 Candidate</i> <ul style="list-style-type: none"><li>Capital Markets, Investment, Private Equity, Affordable Housing</li></ul> | <b>2020 – 2021</b> |
| <b>University of Wisconsin-Milwaukee, School of Engineering, Milwaukee, WI</b><br><i>Bachelor of Science in Civil Engineering</i> <ul style="list-style-type: none"><li>Minor: Urban Planning</li></ul>  | <b>1992 – 1999</b> |

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## PROFESSIONAL EXPERIENCE

- |  |                        |
|--|------------------------|
| <b>True Vine Development, Brookfield, WI</b><br><i>Founder / Partner</i> <ul style="list-style-type: none"><li>Founded True Vine Development to capitalize on real estate development opportunities; led team for new project growth</li><li>Deliver real estate consulting, owner and tenant representation, facility management, and at-risk development for clients and investors; created \$350 MM in value for clients and investors to date</li><li>Analyze value for clients while providing market solutions and fiscal understanding to capitalize on undervalued opportunities; devised business plans and budgets to highlight project baseline and growth outcome</li></ul>  | <b>07/09 – Present</b> |
| <b>Bielinski Homes, Pewaukee, WI</b><br><i>Director of Development</i> <ul style="list-style-type: none"><li>Oversaw a real estate portfolio of 2,700 acres of land at various stages of development permitting and approval process for a private builder/developer/brokerage firm of multifamily, single family, condos, retail, and office projects in Wisconsin</li><li>Collaborated with Executive Team to devise strategic departmental goals for the Department and across 30 various neighborhoods</li><li>Developed public-private partnerships, leveraged financial resources to gain community support and tracked project results</li><li>Coordinated with government agencies for permits and approvals</li><li>Managed planners, engineers, architects, and contractors through development and construction process to build highest and best use for each project</li><li>Created project financials for projects ranging from \$5 MM to \$70 MM</li></ul> | <b>09/03 – 07/09</b>   |
| <b>TN &amp; Associates, Milwaukee, WI</b><br><i>Civil Engineer</i> <ul style="list-style-type: none"><li>Monitored construction management and inspection services for various municipalities on local road improvement projects</li><li>Conducted public information meetings on behalf of Federal, State, and Local government agencies to gain stakeholders support; resulting in project approval and additional revenue for the firm</li><li>Oversaw construction administration on urban freeway reconstruction projects and wetland mitigation projects for WisDOT</li></ul>  | <b>05/99 – 09/03</b>   |

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## TECHNICAL SKILLS

- Microsoft Office, Website Design, Wisconsin Department of Natural Resources (DNR) Stormwater Inspection Regulation

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## COMMUNITY INVOLVEMENT

- |  |                    |
|--|--------------------|
| <b>City of Oconomowoc</b><br><i>Plan Commission Member</i> <ul style="list-style-type: none"><li>Appointed by the Mayor to evaluate all proposed developments within the City to promote future growth</li><li>Reviewed commercial, residential, medical, industrial, and retail projects; added over \$250 MM in city assessed value</li></ul>  | <b>2002 – 2010</b> |
| <b>City of Oconomowoc</b><br><i>Fowler Lake Advisory Committee</i> <ul style="list-style-type: none"><li>Appointed by the Mayor to enhance economic redevelopment of downtown Oconomowoc</li><li>Partnered with business and landowners, elected officials, and other stake holders to construct a long-term strategic plan to redevelop downtown while being sensitive to cost and implementation</li></ul> | <b>2008 – 2009</b> |

# TYLER REMMERS

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021  
*Master of Science in Real Estate Candidate*

- Specialization: Private Equity Investment & Real Estate Development
- Relevant Coursework: Commercial Development, Urban Land Economics, Private Equity Investment

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2016 – 2020  
*Bachelor of Business Administration*

- Majors: Real Estate and Urban Economics & Finance, Investment, and Banking
- GPA: 3.6/4.0

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## PROFESSIONAL EXPERIENCE

**Capri Communities, Waukesha, WI** 07/20 – Present  
*Development Associate*

- Develop and operate over 20 senior living communities including independent living, assisted living, and memory care
- Perform market research, underwrite new deals, and prepare reports/presentations for developments and acquisitions
- Communicate between divisions to bridge the gap in planning, developing, and operating new properties

**CWS Capital Partners, Dallas, TX** 05/19 – 08/19  
*Asset Management Intern*

- Managed over 20 high-rise and garden style multifamily properties across the DFW portfolio
- Learned components of asset management through meetings with CBRE and Costar, participating in Capex walks, reviewing operating budgets, and performing market research in the DFW area
- Traveled to San Antonio and Atlanta to conduct due diligence on potential investment opportunities

**Smart Asset Realty, Waukesha, WI** 12/18 – 01/19  
*Property Management Intern*

- Invested and managed over 800 multi-family units in the Milwaukee area as part of a seven-person team
- Consolidated property information on every unit into master spreadsheet for quick and easy reference
- Executed tasks such as advertising units, cold-calling prospective tenants, analyzing vacancy reports, and filing evictions

**Halen Homes, Brookfield, WI** 05/17 – 08/18  
*Development Intern*

- Supported project managers in process of building over 100 homes in southeastern Wisconsin over two summers
- Assigned as lead project manager to oversee planning, coordination, and construction of one speculative home in 2018

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## Involvement

**Real Estate Club** 09/18 – Present

- Network with fellow real estate majors through monthly club meetings and attend guest speaker workshops with real estate professionals on topics including debt markets, development, and REITs

**Real Estate Private Equity Track** 09/20 – Present

- Invest and manage a live \$3.5 million private equity fund focusing on core real estate sectors and alternative investments
- Create an investment strategy to detail property types, geographic locations, risks, return preferences, holding periods, and other considerations to narrow focus on new deals
- Analyze PPM's, breakdown cash flow waterfalls, and perform due diligence to make detailed decisions on investments

**Wisconsin Fishing Team** 09/16 – Present  
*Treasurer/Sponsorship Coordinator*

- Travel throughout the Midwest to compete in collegiate bass fishing tournaments
- Managed team finances by budgeting tournaments, submitting financial reports, applying for grants, and seeking donations

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## TECHNICAL SKILLS

- Microsoft Office including Excel, PowerPoint, Word, and Outlook
- Financial modeling in Microsoft Excel and Argus

# BLAKE RICHTER

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021  
*Master of Science in Real Estate Candidate*

- Key Coursework: Member of AREIT and Private Equity teams, Urban Economics and Commercial Development

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2016 – 2020  
*Bachelor of Business Administration*

- Majors: Real Estate and Urban Land Economics; Finance, Investment, and Banking
- GPA: 3.61/4.00
- Wisconsin School of Business Dean's List (2020), Bascom Brick Award (2020)
- Big Ten Distinguished Scholar (2020), Academic All-Big Ten (2019, 2020)

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## PROFESSIONAL EXPERIENCE

**North Central Group, Middleton, WI** 11/20 - Present  
*Development Intern*

- Assist with land acquisitions, financing, entitlements, design and construction administration of development and renovation projects
- Research markets to evaluate trends and economic conditions for developments and acquisitions of existing properties
- Prepare financial data and reports for the development and executive management teams

**Liberty Station American Tavern and Smokehouse, Madison, WI** 06/20 – 8/20  
*Server*

- Trained new servers and staff on service expectations, proper food handling, restaurant protocols, and safety procedures
- Multi-tasked between monitoring the dining room and kitchen, ensuring optimal guest experience
- Communicated with team members to keep operations running efficiently

**Madison Development Corporation, Madison, WI** 05/20 – 8/20  
*Intern*

- Assisted management in evaluating investment decisions for the \$10M Dane Workforce Housing Fund
- Reviewed potential Fund projects including due diligence materials and prepared summary analyses based on the Fund's criteria
- Presented at Advisory Committee meetings and compiled committee member questions

**UBS, Madison, WI** 05/17 – 09/17  
*Finance Intern*

- Supported business planning through financial analysis, enabling managers to make informed decisions about the \$4 billion in assets under management
- Researched and monitored economic and regulatory developments to better understand competitor strategies and helped establish new markets for products and services
- Updated and redesigned the intern manual, allowing future interns to transition into the job more efficiently
- Entered clients' portfolio positions into Excel spreadsheets to ensure accurate financial records were kept on file

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## ACTIVITIES

**Real Estate Club** 01/19 – Present

- Network with real estate industry professionals and professors
- Learn from alumni and guest speakers who work in development, asset management, brokerage, and capital markets

**Badgers Give Back** 03/19 – 05/20

- Volunteer in various community service events around Madison with fellow student-athletes

**Wisconsin Rowing – NCAA Division I Athletics** 09/16 – 05/20

- Student-athlete on the men's varsity rowing team at the University of Wisconsin-Madison
- Managed 20 hours of year round practice, travel, and competition while maintaining a full-time course load and Academic All-Big Ten honors
- Worked with 40 teammates to achieve short-term and long-term athletic goals

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## TECHNICAL SKILLS

- Microsoft Office, Excel Modeling, ARGUS, SketchUp, NCR Aloha, OnQ

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## ADDITIONAL INFORMATION

- Student Pilot aspiring to get Private Pilot's License with more than 50 hours of flight time
- PADI SCUBA Certified

# SOPHIA SALVATORE

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## PROFILE

I received my BBA from UW-Madison in 2020 with a double major in International Business and Operations & Technology Management. Beginning in the fall of 2020, I will be pursuing an MS in Real Estate and Urban Land Economics. I hope to combine my international experience and data analysis skills with real estate to assist companies in deciding whether to invest and/or purchase real estate in international markets.

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## EDUCATION

University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI  
2020 – 2021

*Master of Science in Real Estate and Urban Land Economics Candidate*

University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI  
2016 – 2020

*Bachelor of Business Administration*

- Major: International Business and Operations & Technology Management
- GPA: 3.62

Study Abroad: Universidad Carlos III, Madrid, Spain  
Spring 2019

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## PROFESSIONAL EXPERIENCE

Wisconsin Union Campus Events Services Office, Madison, Wisconsin  
08/17 – Present

*Lead Intern/Event Coordinator*

- Reserve meeting spaces and book events for clients, Wisconsin Union Members, Corporate Members, University Departments and Staff, and Student Organizations using EMS event planning software and logical thinking for the Wisconsin Unions' 30+ meeting and event spaces.
- Represent the Wisconsin Union through exemplary customer service to maintain customer loyalty and satisfaction for all users of Wisconsin Union spaces.
- Assist full-time event planners in planning large events by communicating with customers via email, phone, and in-person, creating diagrams, and creating menus to ensure successful execution of 10+ events per week.
- Train newly hired full-time and intern event staff on daily tasks through walkthroughs and hands-on learning to prepare team members for individual work beginning 3 weeks from his/her start date.
- Supervise a team of 8 interns using weekly meetings and task assigning to efficiently reserve meeting spaces and campus classrooms for 100+ registered student organizations.
- Correspond through emails, phone calls, and in-person conversation with departments within the Wisconsin Union and across the UW-Madison campus to understand customer and department needs and answer questions.

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## SOFTWARE AND PROGRAMMING SKILLS

- EMS Event Planning Software
- Social Tables Diagramming Software
- 25Live Scheduling Software
- Microsoft Suite (including Microsoft Access)
- Tableau
- R Script
- Modeling techniques in Excel and Argus

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## LANGUAGES

- Spanish: Proficient in reading, writing, and speaking
- Italian: Comprehensive understanding



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## LICENSES

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- Residential Real Estate License through the Wisconsin Real Estate Association (will complete in November 2020)

# GRANT DAVID STEELE

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021  
*Master of Science in Real Estate Candidate*

- Courses include Real Estate Finance, Real Estate Valuation, Urban Economics, Commercial Real Estate Development, and Excel and Argus Modeling.

**Wittenberg University, Springfield, OH** 2016 – 2020  
*Bachelor of Arts*

- Major: Economics, German Minor: Music
- GPA: 3.7, Cum Laude, University and Departmental Honors
- Kurt J. Fickert Award for Outstanding Foreign Language Scholarship
- Phi Beta Kappa Honors Society

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## PROFESSIONAL EXPERIENCE

**The Heritage Foundation, Washington, DC** 05/19 – 08/19  
*Center for International Trade and Economics Intern*

- Researched for the Monetary Freedom and Rule of Law measures of the 2020 edition of the *Index of Economic Freedom*, the foremost economic indices in the world, as well as data collection of economic indicators for the index.
- Collaborated as a team of four interns and four supervisors with data input, analysis, and revision.
- Leadership training through the *Young Leaders Program*, including daily lectures and seminars on political economy and foreign policy.

**Office of the Mayor, Lutherstadt Wittenberg, Germany** 04/18 – 5/18  
*Intern*

- Assisted with three team projects in the offices of Economic Development and Public Relations.
- Translated and transcribed remarks in German, which the Mayor used for conferences and presentations.
- Stationed in different public-sector postings throughout the city, including documentation work within the city archives.

**National Realty Counselors, Inc., Pleasant Prairie, WI** 06/15 – 01/20  
*Commercial Real Estate Analyst*

- Held this position as a part-time intern during summers and school breaks for five years.
- Prepared narrative commercial appraisal reports for office, industrial, and flex properties, including zoning analyses, site descriptions, market analyses, comparable sales analyses, and real estate tax analyses.
- Compiled information five times during property inspections.

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## TECHNICAL SKILLS

- Data Analysis: Excel (proficient), R (rudimentary), Eviews (proficient), Argus

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## ORGANIZATIONAL EXPERIENCE

**Delta Sigma Phi Fraternity – Beta Iota Chapter, Springfield, OH** 08/18 – 05/20  
*Treasurer, Academic Chair, Scholarship Chair*

- Managed the fraternity budget, scholarships, expenses, and academic performance for nearly two years.
- Inherited a budget deficit of \$7,500 and instituted a new budget plan, leading to a surplus and a financial cushion for the next fiscal year. This budget has since been used as a management tool, acting as a check on executive decisions.
- Imposed a new academic plan, increasing the fraternity GPA to above a 3.0 average.

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## ADDITIONAL LEADERSHIP EXPERIENCE, SKILLS, AND INTERESTS

- Languages: German
- Eagle Scout, Boy Scouts of America Troop 9; led a scout patrol as Senior Patrol Leader and organized a team of 12 scouts and adult leaders to execute and finish my Eagle Scout project.
- Played in orchestra and jazz band as a cellist and bassist for over 13 years, serving as principle bassist for four years, and as principal bass vocalist in the university choir, chamber choir, and chapel choir for four years.
- Alpha Phi Omega Service Fraternity Brother.

# JORDAN TEICHEN

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021  
*Master of Science in Real Estate Candidate*

**University of Wisconsin-Madison, College of Agricultural & Life Sciences, Madison, WI** 2012 – 2017  
*Bachelor of Science in Landscape Architecture*

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## PROFESSIONAL EXPERIENCE

**Saiki Design, Madison, WI** 05/16 – Present  
*Landscape Designer/Project Manager*

- Projected and managed design fees in excess of \$250,000 for multiple types of commercial projects.
- Estimated costs and kept a portfolio of projects on budget from concept to completion.
- Assisted in master planning, managed, and produced site and landscape design, construction details, and concept graphics for a full-block, mixed-use, multi-phase development in downtown Madison, WI.
- Collaborated with architects, engineers, artists, planners, academic institutions, government agencies, developers and contractors on multi-disciplinary projects, meeting multiple types of deadlines on time.
- Overhauled companies' IT infrastructure, including the purchase and integration of a new company server, revamped file organization and data recording, improved security measures, optimized work experience for 15 remote designers, and restructured internal software support and licensing.

**JCT Site Design & Development, Milwaukee, WI** 08/18 – Present  
*Freelance Design*

- Created site and landscape designs for current residents of Frank Lloyd Wright's Rudin House and developed marketing graphics used to support project fundraising.
- Drafted plans of current conditions for new property acquisitions and suggested improvements in accordance with city zoning requirements.

**The Bruce Company, Middleton, WI** 03/15 – 05/16  
*Design Support Intern*

- Traveled to job sites to conduct survey work, including recording dimensions of existing features, inventory of plant material, and grading information. Data collected was compiled into comprehensive existing conditions plans used by the design team to draw plans for clients.

**University of Wisconsin-Madison Environmental Resource Center, Madison, WI** 03/15 – 05/16  
*Administrative Assistant*

- Created informative pamphlets that were distributed to members of the Wisconsin Master Naturalist program.

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## TECHNICAL SKILLS

- AutoCAD
- Adobe Suite (Photoshop, InDesign, Illustrator)
- Sketchup
- Microsoft Office/Outlook (Word, Excel, Powerpoint) [completed UW-Madison RE631 - Excel Modeling course]
- Lumion
- Argus [currently enrolled in RE632 - Argus Modeling course]

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## ADDITIONAL SKILLS

- Client presentation experience, governmental presentation experience
- On-site construction administration
- Experience moving projects through City of Madison Entitlement Process (zoning code requirements, Urban Design Commission presentation, Plan Commission, etc.)
- Planting Plans (able to identify over 300 herbaceous perennials)
- Site grading plans that accommodate city stormwater requirements and ADA accessibility requirements

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## EXTRACURRICULAR INVOLVEMENT

- American Alpine Club Member, American Society of Landscape Architects Member, UW-Madison Real Estate Club Member, Eagle Scout - 2012, Glendale Little League Facilities Manager Volunteer

## LUKE THIELE

luke@thieleconcepts.com • <https://www.linkedin.com/in/luke-thiele> • (262) 290-7949

### EDUCATION

The University of Wisconsin-Madison, Wisconsin School of Business (Graduation May 2021)

*Master's of Real Estate and Urban Economics*

The University of Wisconsin-La Crosse, Majors (Fall 2014 - Spring 2018)

*Bachelor's of Science - Marketing and Management*

*Cumulative GPA: 3.050*

### PROFESSIONAL EXPERIENCE

**Trek Travel, LLC, Madison, WI** (September 2018 - April 2020)

*Inside Sales Consultant*

- Executed a multifaceted sales strategy that included inbound and outbound sales with an active cold calling component. Achieved 146% of 2019 sales goal.
- Led team in annual product package upgrade sales.
- Received annual average 4.7/5 guest services feedback score based on providing exemplary customer service experiences.
- Collaborated among all Trek departments and provided a stellar customer experience while representing the Trek Travel brand.
- Developed and implemented new product upgrade selling language to improve customer satisfaction and overall team efficiency and success.
- Trained new sales team members on best practices and proven sales techniques.

**Kwik Trip Corporate Headquarters, La Crosse, WI** (September 2017 - May 2018)

*Recruiting Associate*

- Conducted phone interviews with candidates and fostered strong relationships with job applicants to help ensure future success.
- Managed position marketing through ads on Google, Facebook, LinkedIn, and company website.

*Credit Department Assistant* (October 2015 - September 2017)

- Responded to customer feedback and made account modifications.
- Addressed customers with credit application inquiries and invoicing questions.

### ORGANIZATIONS

- **Pledge Class President - Delta Sigma Pi** (*Professional Co-Ed fraternity fostering the study of business* (February 2016 - May 2016))
- Managed and assisted team members to ensure quality and completion of assigned tasks.

**Roster Member - Rugby Club** (September 2017 - May 2018)

### VOLUNTEER HISTORY

**Big Brother - Big Brothers Big Sisters 7 Rivers Region, La Crosse, WI** (February 2015 - August 2018)

- Met on a weekly basis and spent time with a youth who is experiencing a difficult time.
- Offered support, love, and kindness through consistent outings and activities.
- Developed a lasting relationship with a special child resulting in personal growth for us both.

# YIWEN TONG

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021  
*Master of Science in Real Estate Candidate*

- Key Coursework: Real Estate Finance, Real Estate Valuation, Urban Economics, Commercial Real Estate Development, Real Estate Capital Markets, Argus and Excel modeling, AREIT team member

**Shanghai University of International Business and Economics, Shanghai, China** 2010 – 2015  
*Bachelor of Business Administration (Sino-Australian Dual-Degree Program)*

- Major: International Business; GPA: 3.67/4.00 (Rank: Top 10%)

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## PROFESSIONAL EXPERIENCE

**Hang Lung Properties, Shanghai, China** 08/19 – 08/20  
*Leasing Officer*

- Led 30+ cross-functional team members from leasing, marketing and management service departments to implement integrated marketing communication strategy and leasing guidelines
- Created immediate impact within 4 months of hire, improving occupancy for kids zone from 77% to 100% totaling 22 tenants, and bringing international kids brands (Miki House & Fine Little Home) to Xuhui area for first time
- Spearheaded development and roll-out of innovative marketing strategies to address 25 tenants' queries regarding mall's interior renovations and proposed early renewal with small rental increase in place of rental reduction requirements
- Convinced management team to adopt more flexible leasing terms such as a low sales breakpoint and a fixed property management fee making the mall more competitive in the Shanghai market and resulting in higher shopper traffic during renovation.

**PuTianDi E-Commerce, Shanghai, China** 10/17 – 06/19  
*Campaign Manager*

- Directed 15+ cross-functional team members from design, IT and execution departments to complete site analysis, rental negotiations and project management for 50+ pop-up stores, helping brands such as Benz, Dyson, and Tmall hold offline campaigns across 30 key malls in Shanghai, generating over \$2 million USD in sales revenue for 2018 (Annual Top Sales)
- Persuaded CEO to develop a new business line with long-term return for first time in company history by internally recruiting eight-person multi-department team to host mall events for Christmas and VIP Program Launch, generating \$0.3 million USD worth of new contracts, replicating business model across entire team with promising follow-up contracts (\$0.1 million USD)
- Oversaw planning, design and execution of Alibaba "Double Eleven" market campaigns for China's biggest annual shopping day in 32 malls, gaining sales revenue of \$1 million USD and cutting procurement costs by 30%
- Formalized training curriculum and provided regular training to 30+ employees regarding differences among shopping center positioning as well as sales pattern to recommend right places

**Sun Hung Kai Properties, Shanghai, China** 07/15 – 05/17  
*Management Trainee*

- Guided three people to manage 60 multinational brands, helping five brands achieve 100%+YOY sales increase by redefining marketing strategy, sharpening visual merchandisers, and optimizing operations based on performance measurement and data analysis
- Initiated and established unprecedented cosmetic zone after in-depth research on 20+ global cosmetic brands and five luxury malls in Shanghai; plan was approved by Leasing Director and obtained 100%+ rental income by \$1 million USD per year
- Launched VIP points-based system; extracted insight and made recommendations for adjusting Customer Relationship Management strategy with double growth in membership within three months
- Redefined positioning strategy of Kids and Food & Beverage (F&B) area by assessing poor sales performance of kids brands and optimizing brand mix of F&B through interviewing over 20 brands including Baby Dior and Lady M

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## VOLUNTEER EXPERIENCE

- Founded Love Association, a charity organization advocating for equity in education that has donated over 1,000 books for World Book and Copyright Day while also helping autistic children
- Aided in raising \$10,000 USD fund for school while leading library program by devising management procedure

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## ADDITIONAL INFORMATION

- Languages: Chinese (native); English (advanced); Japanese (intermediate); French (basic)
- Interests: Travel (60+ cities); Drama & Musicals (50+ plays)

# SAM WESSLEY

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## EDUCATION

- |   |                    |
|---|--------------------|
| <b>University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI</b><br><i>Master of Science in Real Estate Candidate</i>  | <b>2020 - 2021</b> |
| <b>University of Wisconsin-Madison, College of Letters and Science, Madison, WI</b><br><i>Bachelor of Arts</i> <ul style="list-style-type: none"><li>• Major: Economics, Philosophy</li></ul> | <b>2017 - 2020</b> |

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## TECHNICAL SKILLS

- Experienced in Excel, ARGUS, Microsoft Office, Adobe Creative Suite including Photoshop and Illustrator
- Proficient in programming languages including Java, Python, Swift, PHP, C#, and JavaScript; markup languages including HTML and CSS
- App development software including XCode and Unity
- Front-end web development experience including proficiency in WordPress website management

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## ACTIVITIES

- |   |                       |
|---|-----------------------|
| <b>Self-Employed iOS App Developer</b> <ul style="list-style-type: none"><li>• Written, designed, and published several iOS applications to Apple's App Store</li><li>• Developed skills and proficiency in programming, software design, marketing, and entrepreneurship</li><li>• Strategized on optimum presentation, marketing, and visual design elements for attracting users to applications</li></ul> | <b>2014 - Present</b> |
|---|-----------------------|

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## PROFESSIONAL EXPERIENCE

- |  |                        |
|--|------------------------|
| <b>Wisconsin Student Union, Madison, Wisconsin</b><br><i>Caterer</i> <ul style="list-style-type: none"><li>• Collaborate with team members to meet strict goals and time deadlines for events of all sizes</li><li>• Oversee and assist in food and beverage preparation for buffets and place setting for events up to 600+ people</li><li>• Employ quick thinking and problem-solving skills to resolve a wide range of issues that arise during complex events</li><li>• Developed versatile kitchen food preparation skills and gained hands-on experience working in large teams in a dynamic work environment</li><li>• Work with team members to oversee and facilitate all details of dozens of weddings, formal dinners, catered corporate events</li><li>• Provide training to new team members to ensure all members are able to perform jobs efficiently and safely and to certify food safety is maintained</li></ul> | <b>07/19 - Present</b> |
| <b>Larry's Market, De Pere, Wisconsin</b><br><i>Cashier</i> <ul style="list-style-type: none"><li>• Executed duties with ~10% higher-than-average service speed while assisting 200+ customers daily</li><li>• Operated cash registers and recorded daily opening and closing balance; performed analysis of closing balance each day to ensure no discrepancies between registers and computer system</li><li>• Handled sales volumes of \$1,000+ per day</li><li>• Collaborated with all store departments to resolve a variety of customer questions and issues on a daily basis</li></ul>  | <b>08/16 - 03/18</b>   |
| <b>Margarita's of Green Bay, Green Bay, Wisconsin</b><br><i>Server, Busser</i> <ul style="list-style-type: none"><li>• Cooperated with team of 20+ coworkers to provide best possible service to customers and maintain a high level of service and efficiency</li><li>• Managed diverse responsibilities quickly and efficiently in a fast-paced work environment</li></ul>   | <b>08/15 - 08/16</b>   |

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## LANGUAGES

- Limited working proficiency in Spanish and French; ability to read and write at an intermediate level in both languages, and some speaking ability in both languages

# EVAN C. ZIMMERMANN

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## EDUCATION

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**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2021

*Master of Science in Real Estate Candidate*

- Relevant Coursework: Applied Real Estate Investment Track (AREIT), Private Equity Track (REPE), Urban Land Economics, Commercial Real Estate Development

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2016 – 2020

*Bachelor of Business Administration*

- Major: Real Estate and Urban Land Economics
- GPA: 3.57

**City University of Hong Kong, Kowloon Tong, Kowloon, Hong Kong** 2019

*Student Exchange Program*

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## PROFESSIONAL EXPERIENCE

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**Pyle Center, Madison, WI** 06/18 – 03/20

*Bartender / Caterer*

- Served 50-100 reception and dinner attendees on a weekly basis in coordination with other employees
- Attracted sales from the bar while maintaining a clean, organized workstation and delivering quality drinks with high attention to detail
- Collaborated with coworkers to provide thorough and timely support in all catering activities including prepping food, delivering breaks, serving lunches and dinners, and setting reception halls for events

**Wangard Partners, Inc., Milwaukee, WI** 06/19 – 08/19

*Development Intern*

- Assisted in a calculation of an “as-is” valuation of a retail center using MS Excel
- Expanded and updated a feasibility analysis for a possible condominium development
- Conducted a market study in MS Excel using rent comparables to establish an ideal unit mix for an upcoming multi-family development
- Organized groundbreaking event for a new business park, and created a \$15,000 standardized budget and checklist to be used for future events
- Designed marketing materials using Venngage for an upcoming innovation hub project at a restored building
- Engaged in market research to compile regional lists of industrial prospects for a new business park development

**Area Rental and Sales, New Berlin, WI** 06/17 – 08/17

*Event Equipment Installer*

- Efficiently set up and removed tents and rental equipment to ensure customer’s happiness with final product

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## ACTIVITIES

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**Real Estate Club** 09/20 – 05/21

*Co-Vice President / Co-President*

- Act as liaison between faculty advisor and other executive board members for club financials, guest speakers, and administrative duties such as elections, monthly meetings, and semester trips

**Finance Investment Society** 01/16 – 12/18

*Active Member*

- Maintained active membership role through attending segment events, volunteer events, and socials
- Networked with companies and professional organizations through speaker events

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## ADDITIONAL SKILLS

- 
- Completed Wisconsin School of Business ARGUS Enterprise, MS Excel Modeling, and MS Excel Proficiency Course
  - CoStar, MS PowerPoint, MS Word



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Sandra Kubat, Assistant Director, MBA/MS Career Management, [sandra.kubat@wisc.edu](mailto:sandra.kubat@wisc.edu)

Kyle Casey, Employer Relations & Events Coordinator, [kyle.casey@wisc.edu](mailto:kyle.casey@wisc.edu)



# JACK CURTIN

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## PROFILE

*Fitness and sports performance coach with extensive background training athletes in a hospital-based, sports medicine facility. Comprehensive and vast experience working one-on-one with adult populations in a personal fitness studio. Strong track record in developing and retaining client relationships; use scientific knowledge and creative insight to drive client-centric results, customer satisfaction, and retention. Transitioning to a career in real estate which will provide an opportunity to make a tangible impact on a community and interact with a variety of professionals in different thinking situations. Seeking roles with investment or development firms that have a clear strategy and strong competitive advantage, leveraging my entrepreneurial mindset, relationship building experience, and problem-solving skills.*

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** **2019 – 2021**  
*Master of Business Administration Candidate 2021, GPA: 3.93/4.0*

- Specialization: Real Estate
- Key Coursework: Real Estate Finance, Real Estate Financial Modeling, Argus, Real Estate Valuation, Equity Investment
- GMAT: 690

**Marquette University, Milwaukee, WI** **2009 – 2013**  
*Bachelor of Science, Magna Cum Laude, GPA: 3.76/4.0*

- Major: Exercise Physiology
- Dean's List; Biology tutor; Student Mentor

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## PROFESSIONAL EXPERIENCE

**Isthmus Fund, Madison, WI** **08/20 – present**  
*Portfolio Manager*

- Coordinate one of two student-run investment teams that invests on behalf of the \$1.4 million Isthmus Fund, an investment vehicle that is part of the Applied Real Estate Investment Track (AREIT) program at the UW-Madison. The fund will invest in Real Estate Investment Trusts (REITs) throughout the academic year as the team executes their investment thesis.

**Breaking into Wall Street Excel and Real Estate Financial Modeling** **05/20 – 08/20**  
*Self-directed Study/Underwriting Skills*

- Completed an in-depth Excel-based training course and demonstrated mastery by completing a challenging certification test. Finished a difficult, case-based real estate financial modeling course that provided exposure to debt and equity investments across a wide variety of property types and to public and private markets.

**Pete Mueller Performance Group, Milwaukee, WI** **07/18 – 07/19**  
*Head Program Developer/Fitness Coach*

- Developed and implemented software-based fitness templates and weightlifting metrics for 20+ customers by utilizing TrainHeroic exercise program design software; improved client adherence and generated a more consistent and measurable gym experience. Revamped customer onboarding and converted over 75% of new leads to regular clients.

**Pete Mueller Performance Group, Milwaukee, WI** **01/14 – 07/18**  
*Fitness Coach*

- Surpassed weekly client training hour benchmark for 2018, driving growth with a focus on building strong relationships and word of mouth referrals; increased weekly billable hours from 18 to 35 and grew client roster to 25
- Conserved 100% of clients from January 2017 - January 2018 after a price increase by leveraging learning from continuing education to deliver innovative, client-centered programs, generating 13% incremental revenue on a per customer basis

**Froedtert Hospital, Milwaukee, WI** **08/13 – 07/18**  
*Sports Performance Specialist*

- Oversaw athletic development of over 50 athletes, leading one-on-one and group sessions using individualized, sport-specific exercise programs while delivering in-depth coaching; placed in top 20% of staff schedule usage within the Sports Performance Program
- Partnered with a U.S. Olympic Development Speed Skating team through outreach plans to establish relationships with key decision makers and customized assessments followed by tailored solutions presentation; secured multi-year training contract with long and short-track teams

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## PROFESSIONAL DEVELOPMENT

- Software and Tools: Microsoft Office Suite including Excel and Word, Argus, Real Estate Financial Modeling
- UW-Madison Real Estate Club

# EVAN W. GORDER

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## PROFILE

Dedicated real estate professional with experience building a residential value-add portfolio, underwriting commercial investments, developing affordable housing funding programs, & brokerage sales. Seeking full-time opportunities to implement my diverse skill set with a driven investment firm to further my mission for building strong communities through sound real estate investments.

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2019 – 2021  
*Master of Business Administration – Real Estate, James A. Graaskamp Center for Real Estate*

- Graduate Assistant - Real Estate Finance (Fall 2020 Semester)
- Recipient: Walker & Dunlop Innovator Scholarship, Paul B. Gilbert Real Estate Graduate Fellowship
- Activities: 2<sup>nd</sup> Place – 2019 CREFC Real Estate Debt Case Competition, Real Estate Club Board Member
- Coursework: Team lead for University of Wisconsin's inaugural \$3.25M Real Estate Private Equity fund

**California Polytechnic State University, San Luis Obispo, CA** 2008 – 2012  
*Bachelor of Science*

- Major: Business Administration, Entrepreneurship
- Real Estate Club Board Member, four-time Dean's List recipient, Economics Minor

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## PROFESSIONAL EXPERIENCE

**Real Estate Investor, Milwaukee, WI** 10/12 - Present  
*Principal*

- Acquire residential properties - value-add portfolio comprising 6 properties, 11 units
- Manage the acquisition, renovation, and leasing of income properties to grow portfolio assets, value-add investment
- Build a team of contractors, property managers, leasing agents, & accountants

**MBA Summer Associate, San Francisco, CA** 06/20 – 08/20  
*PGIM Real Estate - Transactions*

- Integral team member contributing to the underwriting of 7 commercial real estate deals using Excel & ARGUS models
- Involved in the successful approval of multiple project memos & briefs to fund allocation & investment committee
- Conducted due diligence on prospective deals including contacting brokers & use of databases to verify model assumptions

**California Department of Housing & Community Development, Sacramento, CA** 11/16 – 10/19  
*Climate Change Programs Manager - Program Design & Development*  
*Underwriter - Notice of Funding Availability*

- Managed & implemented policy change for \$950M in critical climate change programs impacting the State of California
- Originated over \$44M in funding awards for affordable housing developments throughout California
- Implemented reporting efficiencies of application data, reports for leadership now generated in 24 hours from receipt
- Briefed executive leadership including the department Director & the Governor's Office on key program activities

**Real Estate Broker, Sacramento, CA & Milwaukee, WI** 05/14 – 09/19  
*Principal Broker & Broker Associate*

- Over \$2.1M transaction volume across multiple states - 12 transactions, 18 properties, 41 units
- Managed & advised real estate investor client relationships and coordinated transactions to close
- Analyzed & determined value of commercial and residential real estate, comparable sales & income approaches

**Stangl Advisors, San Francisco, CA** 04/15 – 10/16  
*Marketing & Sales Director, Real Estate Services*

- Integral member of the team brokering real estate transactions of over \$19M, expanded business to buy-side clientele
- Analyzed and determined value of commercial & residential real estate, comparable sales & income approaches
- Managed timelines by coordinating parties to meet deadlines & close transactions

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## LICENSES & MEMBERSHIPS

- Licenses: Real Estate Broker, Wisconsin & California
- Memberships: CRE Finance Council, Urban Land Institute, California Association of Realtors

# BENJAMIN J. GORDON

(310) 991-2353 • [linkedin.com/in/benjaminjackgordon](https://www.linkedin.com/in/benjaminjackgordon) • [bjgordon@wisc.edu](mailto:bjgordon@wisc.edu)

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## EDUCATION

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University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI 2019 – 2021

*Master of Business Administration Candidate – Graaskamp Center for Real Estate*

- Specialization: Real Estate
- Relevant Coursework: Real Estate Finance, Excel Modeling, Argus, Urban Economics, Valuation, Commercial Development, Operations Management, Marketing Management, and Financial Accounting

University of Wisconsin-Madison, Madison, WI 2010 – 2014

*Bachelor of Arts in Political Science, Minor in Integrated Liberal Studies*

- Student Involvement:
  - Host/Broadcaster of “The Last Call,” a weekly sports radio show at WSUM

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## PROFESSIONAL EXPERIENCE

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Gordon Real Estate Development & Investments, Los Angeles, CA

06/16 – Present

*Founder & President*

- Directed acquisition of 5+ single-family and multi-family homes in Memphis, TN and Cleveland, OH areas.
- Controlled and established budgets between \$50k-\$150k and generated deadlines over all aspects of development, renovation, rehab, and construction.
- Dramatically improved 5+ single-family and multi-family properties, supervised construction & sourced property managers by negotiating an average of 20-30% higher lease prices for properties.
- Exceeded revenue goals and successfully generated an average ROI of 20%.

Collab Studios, Los Angeles, CA

04/16 – 02/19

*Manager, Content Partnership (08/17-02/19)*

- Closed 20+ multi-million-dollar business deals by sourcing content aggregators, coordinating requirements, and negotiating contracts.
- Managed a team of 15 employees in the areas of in finance, marketing, development, and production.
- Organized and drove 12+ YouTube channels to foster effective content and viewership growth of 20-50% through partnering with high-growth video creators.
- Successfully sought out new partnerships, platforms, and tactics to drive a higher market share and stay on forefront of digital media.

*Coordinator Business Development (04/16-08/17)*

- Advised 25+ talent on YouTube, Instagram, Facebook, Musical.ly, Twitter, Snapchat, and Vine and improved content as well as audience growth strategy.
- Developed and delivered original content & IP with talent and brands across YouTube, Netflix, Hulu, Rated Red & Crackle.
- Project manager on 50+ productions/influencer accounts, which paid out over \$25 million to creators and right holders.
- Crafted social media marketing strategies for 20+ commercial brands by pairing them with content creators to influence brand partnerships.

Creative Arts Agency, Beverly Hills, CA

02/15 – 04/16

*Assistant, Head of Television*

- Transcribed, formatted, input, edited, retrieved, copied, and transmitted text, data, and graphics.
- Read, researched and analyzed information to improve agent and television department productivity.
- Coordinated meetings, conferences, teleconferences, and international travel for agents and high profile clients.

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## Board Memberships

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Cure Cervical Cancer ([curecervicalcancer.org](http://curecervicalcancer.org)), Board Member, 08/19 – Present

- Organization is dedicated to early detection & prevention of cervical cancer; provides equipment to create self-sustaining prevention/treatment clinics and conducts training for local health care providers. Board members participate in financial decision making and participate in global missions to establish clinics in high-needs areas around the globe.

Leonard Hill Charitable Trust, Board Member, 08/16 – Present

- California-based non-profit focused on distribution of needs-based grants and gifts; trust has supported organizations and projects primarily in the Los Angeles area ranging from \$1M-\$20M.
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## CERTIFICATIONS

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Licensed Real Estate Sales Person - California

*BRE #01971406*

# CAROLYN J. KANE

(952) 358-1635 • linkedin.com/in/carolynkane14 • cjkane3@wisc.edu

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2019 – 2021

*Master of Business Administration Candidate (Class of 2021), Real Estate specialization*

- Cumulative GPA: 3.97
- Recipient: Real Estate Club Co-President, Goldie B. Wolfe Miller Scholar, CREW Scholar CRE Finance Council Debt Case Competition Runner-Up, Nathan Brand Award for Excellence in Real Estate Analysis, Forté Fellowship Scholarship
- Relevant Coursework: Private Equity Track, Urban Economics, Commercial Property Development, Real Estate Finance & Investment, Real Estate Capital Markets, Real Estate Valuation, ARGUS Modeling, Excel Real Estate Modeling

**Denison University, Granville, OH** 2013 – 2017

*Bachelor of Arts, Economics & Communication Studies, cum laude*

- Economics GPA: 3.82, Communication Studies GPA: 3.81
- Recipient: Dean's List, Top 50 Scholar-Athlete, Four time Academic All American, NCAC Conference Academic Honor Roll, Founder's Scholarship, Park National Bank Scholarship in Economics
- Involvement: Denison University Swim & Dive Team, Economics Tutor, Member of Lambda Pi Eta - Communication Studies Honor Society, Member of Mortar Board Senior National Honors Society, Member of Delta Gamma Fraternity

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## PROFESSIONAL EXPERIENCE

**Link Logistics (Blackstone's U.S. industrial operating platform), Chicago, IL** 6/20 – Present

*Intern, Investments and Asset Management*

- Provide support in performing fundamental analysis to make investment recommendations and monitor ongoing investment opportunities and industry trends including valuation analysis, market research, data mining, and development of presentations.
- Responsible for supporting the Minneapolis asset management team with a myriad of analytical duties related to leasing such as drafting Deal Approval Sheets, assisting in the annual budget, meeting with brokers, and evaluating market trends.
- Perform asset sales pricing analysis for potential disposition opportunities.

**RED Capital Group, Columbus, OH** 6/17 – 6/19

*Analyst, Multifamily Originations*

- Member of four-person team that regularly closed over \$40MM per month of Market Rate, Multifamily deal volume.
- Structured senior and subordinated debt capital for market-rate multi-family developers nationwide. Closed over \$450MM worth of deal volume in fiscal year 2018 for about 25 borrowers.
- Experienced in construction, bridge, refinance, and acquisition lending opportunities with a full range of debt types (Fannie Mae DUS, FHA, and Balance Sheet). Evaluated best lending options and deal structures based on borrower's needs.
- Executed complex financial modeling and drafted deal narratives for submission across agency lenders.

*Development Program Associate*

- Selected to be part of the competitive RED Capital Group Associate Development Program, program included rotations in FHA Underwriting, Fannie Mae Underwriting, Affordable Housing Originations, Market Rate Originations and Senior Housing Originations. Produced credit narratives, financial models, site inspections, underwriting, loan sizing and structuring.

**Merrill Lynch Wealth Management, Wayzata, MN** 5/16 – 8/16

*Seasonal Client Associate*

- Prepared comprehensive plans for client reviews to evaluate progress toward financial and retirement goals including performance of investment portfolios for client meetings.
- Responded to client requests and managed client financial data in company database.

**Colliers International, Minnetonka, MN** Summer 2015, 2016

*Corporate Services Intern*

- Organized and researched potential targeted contacts to secure new business in partnership with the corporate real estate business development department. Worked with corporate clients to develop company's supplier diversity programs.

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## LEADERSHIP

**Real Estate Club, Madison, WI** 5/20 – Present

*Co-President*

**Urban Land Institute, Columbus, OH** 11/17 – 6/19

*Mentor Program Chair* - Matched groups of young leaders with industry veterans to build relationships and share best practices.

**Denison University Women's Swim and Dive, Granville, OH** 9/16 – 5/17

*Team Captain* - Two Time Division III National Champion, 26 Time All-American, 17 Time NCAC Conference Champion, Current All-Time School Record Holder in Three Events, Led Team to National Runner Up (2015) and 4th Place (2014, 2016, 2017)

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## ADDITIONAL INFORMATION

**Software and Tools:** Proficient in Excel, PowerPoint, Word, Argus; **Interests:** Travel, outdoor activities, running, and swimming

# PETER K. LASKEY

(317) 833-6610 • linkedin.com/peterklaskey • plaskey@wisc.edu

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## PROFILE

*I have a proven record of maximizing the value of assets through expertise in revenue management, operational budgeting, and demand forecasting. These skills, integrated with my real estate MBA education, make me a valuable addition to a real estate development or investment management firm.*

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2019 – 2021

*Master of Business Administration Candidate – Graaskamp Center for Real Estate*

- Specialization: Real Estate and Urban Land Economics, 3.79 GPA
- Applied Real Estate Investment Track: Co-Portfolio Manager of the Isthmus Fund, a \$1.5 million fund for investment in public REITs
- Business Spanish Certificate – Certification in advanced Spanish language for business
- *Relevant Coursework: Real Estate Valuations, Real Estate Equity Investments, Urban Economics, Commercial Development, Private Equity Investments, Construction Project Management*

**Booth Summer Business Scholar Program** 2014

*University of Chicago Booth School of Business*

**Colorado College, Colorado Springs, CO** 2010 – 2014

*Bachelor of Arts*

- Major: Philosophy/International Studies, 3.41 GPA

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## PROFESSIONAL EXPERIENCE

**The Excel Group, Washington, DC (Remote)** 06/20 – 08/20

*Acquisitions & Asset Management Intern*

- Evaluated potential hotel deals by analyzing top-line forecasts, expenses, and market conditions; inputted assumptions into Excel DCF models.
- Supported asset management department in cash flow control, energy consumption, and other related analyses.
- Edited investor relations document verbiage and assisted in investor communication of asset performance.

**Bedderman Lodging, Chicago, IL** 08/18 – 08/19

*Director of Revenue*

- Orchestrated optimization of boutique hotel room revenue for Chicago market (3 hotels, 115 total rooms) by integrating custom-built Excel reporting and leveraging selling channels.
- Formulated top-line room revenue budgets for all hotels for full-year 2019, coordinated with market projections, new hotel pipeline, and hotel renovations. Total top-line budget for hotel portfolio of \$7.5 million.

**Portfolio Hotels, Chicago, IL** 06/16 – 06/18

*Area Director of Revenue Optimization*

- Revamped revenue management for Kinzie Hotel (4-star, 215 rooms) in downtown Chicago by integrating automated pricing system, growing market share by 2.2% in highly competitive market within first year
- Supervised reservations department with two direct-report, full-time employees, and trained employees on basic revenue management principles.

**White Lodging, Merrillville, IN** 10/14 – 06/16

*Revenue Optimization Manager*

- Managed revenue management for a portfolio of 8 branded hotels in suburban Austin, TX, worked with hotel sales manager and general manager to formulate optimized sales strategy.

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## SKILLS

- Software and Tools: Advanced Microsoft Office Suite, Argus, Tableau, IBM Cognos
- Advanced Spanish language
- Advanced business writing, data analysis, and public speaking

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## AWARDS and ACHIEVEMENTS

- 2019 NAREIM Jeff Barclay Fellow; published two articles in *Dialogues* quarterly journal
- Recipient: Together Forward Scholarship (\$20k), Wisconsin RE Alumni Scholarship (\$5k)

# MARK SCHAER

(815) 494-8799 • [linkedin.com/in/mark-schaer](https://www.linkedin.com/in/mark-schaer) • [schaer2@wisc.edu](mailto:schaer2@wisc.edu)

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI**

**2019 – 2021**

*Master of Business Administration Candidate*

- Specialization: Real Estate
- Key Coursework: Real Estate Private Equity Track; Commercial Property Development; Excel and ARGUS Modeling; Real Estate Finance & Investment; Techniques in Real Estate Valuation; Real Estate Equity Investment; Urban Economics
- Co-President, Real Estate Club
- 1<sup>st</sup> Year Representative, Graduate Business Association

**University of Illinois at Urbana-Champaign, Champaign, IL**

**2013 – 2017**

*Bachelor of Science*

- Major: Marketing; Minor: Public Relations
- Student Senator, Illinois Student Government (2014-2017)
- Co-Chair, Ad-Hoc Committee on the Exploration of a University Mascot, Illinois Student Government (2016)
- Treasurer (2014-2015), Business Manager (2015-2016), and President (2016-2017), No Comment A Cappella
- Chancellor's Scholar, James Scholar (2014-2017)

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## PROFESSIONAL EXPERIENCE

**Verbhouse, San Francisco, CA**

**05/20 – Present**

*Affordable Housing Intern (Virtual)*

- Creating Excel model from scratch to guide potential new strategy of firm in mass purchasing and rehabbing of homes in the San Francisco market
- Analyzed single family residence markets in Madison, WI and San Francisco, CA; created Excel data spreadsheets for each market for use with institutional client pitches
- Created affordability matrix of Madison market to determine whether or not an institutional investor in the area would be feasible given housing price, stock, and salary constraints
- Became familiar with firm's financial model in order to create affordability matrices

**Rooted, Rockford, IL**

**05/20 – Present**

*Real Estate & Finance Consultant*

- Created business plan, including five years of income statement projections, as part of the process for bidding on a commercial building through Winnebago County vacant property auction
- Advised owner on proper insurance coverage for property and general business during rehab of newly acquired property
- Assisted with research of permit applications and big-picture planning and budgeting for property rehabilitation
- Wrote up private loan for property acquisition and created amortization schedule

**Eckburg Insurance Group, Rockford, IL**

**11/17 – 07/19**

*Marketing Coordinator, Insurance Assistant*

- Specialized in quoting rental property insurance and issued over 50 rental property policies by applying knowledge of available coverage and discussing investment goals of property owners with sales agents
- Sold over \$55,000 of new policies in property and casualty through referrals and internet leads; maintained property and casualty insurance license
- Ran the agency email marketing system; uploaded client reports and scheduled outgoing communications to garner five-star Google (57) and Facebook (31) reviews
- Executed the agency's re quoting process with 15 personal insurance companies to retain up to 40 clients and over \$10,000 of business per month

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## TECHNICAL SKILLS

- ARGUS software
- Microsoft Excel
- Website editing – SquareSpace, WordPress

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## COMMUNITY INVOLVEMENT AND INTERESTS

- United Way of Rock River Valley 100th Anniversary Gala Committee
- Member of IGNITE Young Professionals; participated in 2018, 2019 IGNITE Cup
- Eagle Scout, Boy Scout Troop 37, Blackhawk Area Council



**WISCONSIN**  
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# **Wisconsin School of Business**

## **MBA in Real Estate**

### **Class of 2022 Resumes**

#### **Wisconsin MBA/MS Career Management Center**

Gina Jenkins, Director, MBA/MS Career Management, [gina.jenkins@wisc.edu](mailto:gina.jenkins@wisc.edu)

Betsy Golomski, Assistant Director, MBA/MS Career Management, [betsy.golomski@wisc.edu](mailto:betsy.golomski@wisc.edu)

Sandra Kubat, Assistant Director, MBA/MS Career Management, [sandra.kubat@wisc.edu](mailto:sandra.kubat@wisc.edu)

Kyle Casey, Employer Relations & Events Coordinator, [kyle.casey@wisc.edu](mailto:kyle.casey@wisc.edu)



# JONNIQUE DALE

(609) 431-0814 • [linkedin.com/in/JonniQueTruth](https://www.linkedin.com/in/JonniQueTruth) • [JDale5@wisc.edu](mailto:JDale5@wisc.edu)

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## PROFILE

Career changer with extensive experience working in education, entertainment and real estate. Seeking new opportunities that will contribute to industry-specific knowledge necessary to secure a position with a commercial real estate development firm.

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2022

*Master of Business Administration Candidate*

- Specialization: Real Estate
- ROMBA Fellow

**Saint John's University, College of Professional Studies, Jamaica, NY** 2010 – 2012

*Bachelor of Science Graduate*

- Major: Mass Communications
- Minor: Business Administration, Film Studies, International Studies
- University of the West Indies Mona Exchange Program Participant | Discover the World Program Participant
- Benjamin Gilman Scholarship Recipient, Best Buy Scholarship Recipient, Dr. Alma Adams Scholarship Recipient
- Dean's List 2011-2012
- SWELL Member, Resident Housing Council Treasurer, Campus Ministry Member, NYWICI Member, ODK Member

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## PROFESSIONAL EXPERIENCE

**Coldwell Banker, Hoboken, NJ** 07/17 – Present

*Broker Associate*

- Collaborate with more than 10 residential buyers in purchase of over 1.2 million of single-family, multi-family, and mixed use property in New Jersey
- Listed \$2.7 million of residential real estate in an effort to assist property owners with selling over 15 assets
- Advise business owners with negotiating and structuring long-term full service, net and gross commercial leases

**The V.E.G., Jersey City, NJ** 03/09 –

**Present**

*Artist Manager*

- Devise and take steps to collaboratively execute career plans for 10 artists currently on roster
- Manage and spearhead projects while securing, negotiating and overseeing fulfillment of contracts for bookings, sponsorships and music distribution along with a close team of 1 attorney, 2 booking agents and a publicist
- Oversee and direct in usage of portfolios and catalogs for over 30 projects, and guide artists in pricing and proper licensing of creative work
- Managed \$8,000 budget for planning and execution of a 10-city, 15 show regional tour for 22-piece orchestra

**Federal Trio Program - GEAR UP at New Jersey City University, Jersey City, NJ** 05/14 – 05/17

*Instructor*

- Instructed in Core English for more than 200 high school freshman and seniors as part of NJ college preparatory curriculum designed to help students in pursuit of higher education at undergraduate and graduate levels
- Delivered academic support and strategically initiated effective lessons designed to improve verbal and written performance on standardized tests required to fulfill NJ graduation requirements and college entrance exams
- Evaluated, taught, and coached students through social reform curriculum for 20-week entrepreneurship course developed to empower students to become business leaders in traditionally underrepresented communities

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## CERTIFICATIONS

- State of New Jersey | Department of Education  
Career and Technical Education, CE Teaching License 2016
- State of New Jersey | Department of Banking and Insurance  
Real Estate License: Salesperson, 2011 | Broker-Salesperson, 2015  
Real Estate Designations | Accredited Buyer's Representative, e-Pro, Seniors Real Estate Specialist

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## PROFESSIONAL MEMBERSHIPS/ASSOCIATIONS

- National Association of Realtors 2011 - Present

- New Jersey Association of Realtors

2011 - Present

# CHRISTIAN TYLER GIGANTE

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## EDUCATION

### University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI

2020 – 2022

*Master of Business Administration Candidate*

- Specialization: Real Estate
- Key Coursework: Real Estate Finance, Real Estate Valuation, Excel Modeling and Argus Modeling
- Recipient: Merit Award – James A. Graaskamp Center for Real Estate

### University of Notre Dame, Notre Dame, IN

2007 – 2011

*Bachelor of Business Administration*

- Major: Information Technology & Management
- Study Abroad: Notre Dame London Program, London, England, Summer 2009

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## PROFESSIONAL EXPERIENCE

### Fairfield Place & Fairfield Commons, Dayton, OH

06/18 – 8/20

*Family's \$12M Commercial Real Estate Portfolio: +40k square feet of restaurant and retail space spread across retail centers and outlots*

*Managing Partner*

- Negotiated 15-year lease for a new restaurant, adding over \$1M in value over the previous lease
- Lead refinancing efforts for key retail center which cut debt service by 50% and increased net operating income by +75%
- Revamped CAM reconciliation and tax reimbursement process to recoup +\$125k in recoverable expenses
- Executed outstanding lease options to increase rent by 25% and extend leases 3-5 years, yielding +\$130k in additional revenue
- Facilitated transition to a new professional management company cutting management fees in half
- Managed investment property renovation resulting in a +40% increase in rental income

### KW Commercial, Minneapolis, MN

11/18 – 06/20

*Commercial Real Estate Broker*

- Completed multiple broker opinion of values to provide clients with updated property valuations, comparable sales, and in-depth market analysis, allowing them to confidently make important sell/hold business decisions
- Executed a five-year lease for a national insurance agent, stayed within client's goal rent range by negotiating landlord's offer down 16% and eliminating yearly rent increases while maximizing landlord buildout costs to ensure Class A quality office space
- Established process to better evaluate investment properties for internal investors by analyzing capital expenditures, management fees, and other unique factors, leading to investment opportunities with exceptional cash-on-cash returns and cap rates

### Target, Minneapolis, MN

09/11 – 06/18

*Project Manager*

- Developed strategy to activate new supply chain capabilities delivering three Small Format stores with 50% smaller backrooms by assessing the capability needed to optimize freight flow and reduce inventory; employed across 34 additional Small Format stores
- Created a maximum replenishment override in order to mitigate excess inventory in Target's smallest stores, reducing excessive pallet quantities by 75% and preventing severe overstocks
- Managed inventory for high focus northeast stores resulting in a 380 basis point out-of-stock improvement during the 4th Quarter, driving a +14% year-over-year sales comp in mature stores and a +34% beat to forecast for new stores

*Sr. New Store Analyst*

- Opened and supported 33 new stores, leading the Home pyramid through the new store process; reduced core team workload by 80% by reinventing the process and decreasing touchpoints; implemented new process and maintained green out-of-stock results
- Managed assortment strategy, forecasting, and product flow; drove +14% sales comp across key back-to-college stores
- Discovered system flaw and recommended critical system enhancements reducing ineffective inventory by 85%

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## AWARDS AND LEADERSHIP

- Awards: Target's Senior Vice President Award (2013, 2015, & 2018) and Target's Leadership Excellence Award (2015)
- Community Leadership: Notre Dame Club of Minnesota, Volunteer Head Basketball Coach
- Interests: Real Estate Investor, Avid Golfer, Sports Fanatic

# AISHWARYA LEEN

(617) 991-0589 • <https://www.linkedin.com/in/aishwarya-leen> • [aleen@wisc.edu](mailto:aleen@wisc.edu)

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## PROFILE

A goal oriented professional with experience in Collateralized Debt Obligations (CDOs). An MBA candidate in Real Estate pursuing a career in Commercial Real Estate, with a background in Finance, Economics and a wide range of skills including accounting, market analysis and credit risk analysis.

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2022

*Master of Business Administration Candidate*

- Specialization: Real Estate
- Key Coursework: Real Estate Finance, Financial Management, Financial accounting
- Recipient of the Arthur P. And Gail A. Pasquarella Real Estate Scholarship Fund and Davis Scholarship

**Northeastern University, MA** 2014 – 2018

*Bachelor of Science in Business Administration*

- Major: Finance Minor: Economics GPA: 3.4
- Awards and Activities: Dean's List, Real Estate Club, Finance and Investment Club, Women in Business

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## PROFESSIONAL EXPERIENCE

**US Bank, Boston, MA** 03/19 – 08/20

*Portfolio Administrator*

- Maintain CDO Collateral portfolios for eight clients and provide reports on a monthly basis ranging from \$5 bln to 16 bln
- Settle 20+ bond/loan trades and invest excess cash as directed by the Portfolio Manager
- Work closely with multiple cross-functional teams including client services, asset pricing and financial reporting
- Track asset attributes such as accrual information, ratings, industry codes for eight clients
- Process and confirm 100+ trades weekly, fix errors, and ensure they adhere to U.S. Bank rules

**Santander Bank, New York, NY** 07/17 – 12/17

*Credit Analyst Co-op*

- Prepared annual reviews as well as FEVE and HLT review presentations for credit committee
- Processed obligor risk ratings bi-weekly and maintained credit files for five clients
- Identified adverse developments and obtained internal approval for transaction amendments
- Ensured compliance with US bank regulations and internal credit policies and procedures
- Coordinated with credit committees in US & Madrid in sector analysis and review of credit exposure

**State Street – Global Services, Boston, MA** 01/16 – 06/16

*Financial Reporting Co-op*

- Prepared and reviewed interim and annual US GAAP/IFRS financial statements for around 11 clients
- Generated reports capturing differences in internal accounting systems and initiated solutions
- Researched investment securities utilizing Bloomberg
- Coordinated the distribution of financial statements to both internal and external parties

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## PROFESSIONAL SKILLS

- Proficient in Microsoft Excel (graphs, queries and data sort), Microsoft Word, Outlook, PowerPoint and Argus
- Conversational in Hindi and Marathi
- Bloomberg certified

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## INTERESTS AND ACTIVITIES

- Certified scuba diver
- Level 2 piano
- Debate and Tennis

# DANIEL MANDEL

(414) 412-1244 • <https://www.linkedin.com/in/danieljmandel/> • [djmandel@wisc.edu](mailto:djmandel@wisc.edu)

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## PROFILE

*Accomplished and versatile financial services leader with experience screening and underwriting loans and developments across the country. Proficient at analyzing market, finance, and other data to deliver actionable insights for improved decision making. Believe in building communities through responsible capital sources, which is why I am an active volunteer committee and board member for a local non-profit organization that issues interest free loans. Skilled at cultivating and maintaining strong business relationships.*

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## EDUCATION

### University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI

2020 - 2022

*Master of Business Administration Candidate*

- Specialization: Real Estate
- Key Coursework: Real Estate Excel Modeling, Real Estate Finance
- Recipient "Together Forward" Merit Scholarship

### University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI

2012 - 2015

*Bachelor of Business Administration*

- Majors: Real Estate and Urban Land Economics; Economics
- Recipient: "Curt S. Culver Real Estate" Merit Scholarship. Graduation with Distinction (Top 10%)
- Publication: Mandel, Daniel (2015), "Urban Rail Transit Expansions", in Urban Land Economics, Springer International
- Key Coursework: Retail and Office Property Modeling using Argus and Excel, Real Estate ("RE") Presentation and Investment Analysis, RE Capital Markets, RE Healthcare, RE Site Design, Investment Theory and Practice, Valuation of RE, The RE Process, Site Layout and Building Floor Plate Design, Residential Property Development, RE Law, RE Finance, Professional Communication, Principles of Risk Management, Business Law, Calculus and Intro. to Differential Equations

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## PROFESSIONAL EXPERIENCE

### BB Living Residential, Phoenix, AZ

09/19 - 05/20

*Vice President of Data Analytics*

- Underwrote and screened nationwide land acquisitions for new communities of build-to-rent single-family homes with costs in excess of \$500MM by investigating market conditions and statistics resulting in selection and investment presentation for two (2) land acquisitions for new communities with combined costs of over \$80MM.
- Initiated eight (8) weekly local land acquisition calls with Toll Brothers to get local housing and land activity updates in order to monitor new opportunities to better manage company's deal flow.
- Crafted recommendations to persuade homeowner's associations (HOA) to reduce the HOA expenses for communities under contract by examining community legal documents resulting in stronger financial returns.
- Led search for multi-family data source by evaluating proposals, negotiated with best vendor to obtain a custom solution while reducing cost by \$8,000 annually, and initiated data integration optimizing investment modeling and monitoring.

### KeyBank Real Estate Capital, Phoenix, AZ

12/17 - 05/19

*Underwriter*

- Facilitated underwriting of 50 multi-family loans totaling \$890MM by identifying problems, proposing constructive solutions, conducting site inspection due diligence, evaluating market competitiveness, leading coordination calls with deal team and clients, and authoring a comprehensive submission while meeting deadlines and generating over \$17.35MM in revenue.
- Performed specialized underwriting of 15 loan assumptions totaling more than \$200MM by working with buyers and sellers of real estate to identify problems, propose constructive solutions, and draft a comprehensive submission with analysis of credit quality, risk mitigation, and compliance with investor guidelines generating over \$1.2MM in revenue.

### KeyBank Real Estate Capital, Phoenix, AZ

07/15 - 11/17

*Senior Production Analyst*

- Collaborated to originate over \$2.4B in multi-family loans for purchase by Fannie Mae, Freddie Mac, life insurance companies, FHA, and other lenders by screening and structuring opportunities, composing comprehensive submissions with analysis of credit quality, risk mitigation and compliance with investor guidelines resulting in over \$47MM in revenue.
- Trained, mentored, and distributed workflow to five (5) new analysts by walking through loan production process resulting in improved team productivity.
- Strengthened production process by working with team to implement new technological efficiency initiatives in pipeline tracking, data automation, and application deposit wire auditing resulting in significant time savings.

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## PROFESSIONAL ASSOCIATIONS

- Urban Land Institute Member and Arizona Partnership Forum Young Leader
- Wisconsin Real Estate Alumni Association Member and Mentor
- University of Wisconsin-Madison Real Estate Club Member

# ROMAN OROZOV

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2022

*Master of Business Administration Candidate with a Specialization in Real Estate*

- Key Coursework: Real Estate Finance, Real Estate Valuation, Excel and ARGUS Modeling, Financial Management, Financial Accounting, Data to Decisions, Leading and Working in Teams
- Recipient: WREAA (Wisconsin Real Estate Alumni Association) Graduate Scholarship

**North Park University, Chicago, IL** 2015 – 2019

*Bachelor of Science*

- Major: Business and Economics, GPA: 3.52
- Graduated Cum Laude and CCIW All-Academic Honors -4-year student-athlete (baseball)
- Others: Dean's list three out of four years (maintained a GPA of 3.5 or above), Led the baseball team in top 10% best GPAs

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## PROFESSIONAL EXPERIENCE

**ICM Properties, Chicago, IL** 03/19 – 06/20

*Leasing Specialist*

- Specialized in executing contracts for rental apartments and negotiated 50+ lease contracts and brought over \$720,000+ annually translating to monthly recurring revenue of \$60,000+
- Advertised over 2,000 residential, rental properties through visual media websites such as Zillow, HotPads, and Apartments.com and produced a weekly average of approximately 50 leads with a showing rate of 30% leading to 20% signing an official contract with ICM Properties
- Attained top performer from a total of 10 junior leasing agents by acquiring 21 deals within a period of 6 months
- Executed 21 deals within the first 9 months and 30 new deals during the last six months equating to a 214% increase in personal sales, on average, per month
- Managed duration of agents from 6 different agencies keeping keys to attend showings for available inventory by using a specific key check-in-check-out system
- Implemented virtual tours by requesting and offering rent concessions for tenants willing to take brief videos of apartment units so future tenants could avoid person-to-person contact, thus preventing a loss of \$16,000 annually of monthly recurring revenue by filling up about-to-become-vacant apartments
- Maintained and documented accurate record of new and existing clients for future business purposes such as referral requests and apartment searches
- Achieved a 60% retention rate per month by emailing and scheduling phone calls with 50+ tenants two months prior to allowing lease expirations to occur

**Northwestern Mutual, Skokie, IL** 05/18 – 10/18

*College Financial Representative*

- Led college financial representatives in revenue generation by closing over \$27,000 in annual premiums
- Created and analyzed personal needs analysis for over 30 CEOs of major trucking companies and discussed various financial goals such as follows: saving as percentage of income, specific amount of money generated from investments per month, insurance coverage in case of an incident, and desired monthly paycheck during retirement
- Recommended solutions to help three major clients, owners of large trucking firms, reach financial security either short term or long term by building emergency funds, and/or investing in life insurance products and mutual funds

**University of Wisconsin, Madison – University Housing, Madison, WI** 08/20 – present

*Robot Delivery Coordinator*

- Managed and expedited the Starship Technologies robot delivery program in Dining and Culinary Services

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## TECHNICAL EXPERIENCES AND CERTIFICATES

- Certificates: Online Retail Real Estate Institute Certificate for Students by ICSC; IL Accident and Health Producer and IL Life Producer by Pearson Vue
- Software and Tools: ARGUS software, Microsoft Excel, Microsoft Word, Credit Analysis, Yardi Voyager, CoreLogic

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## INTERESTS AND ACTIVITIES

- Interests: Real Estate, Private Equity, Additive Manufacturing, Housing Affordability, AI, Sustainability, Reading Nonfiction
- Clubs: UW Real Estate
- Volunteer Activities: Bulgarian Red Cross
- Languages: Fluent in both written and spoken Bulgarian and English

# MARK H. SCHNEIDER

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## PROFILE

*Driven former Active Duty Army Officer with five years of experience in leading soldiers and civilians, managing government property, and building and refining systems. Leveraging my business background, military background, and MBA in Real Estate, I hope to concentrate on planning, financing, and constructing real estate with a focus on delivering safe affordable housing.*

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## EDUCATION

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2020 – 2022  
*Master of Business Administration Candidate – Specialization in Real Estate*

- Key Coursework: Real Estate Finance, Real Estate Valuation, Real Estate Capital Markets, Financial Accounting, Data to Decisions, Excel and Argus modeling
- Recipient: Wisconsin School of Business Alumni Fellowship

**University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI** 2011 – 2015  
*Bachelor of Business Administration*

- Major: Finance, Investment and Banking
- Army Reserve Officer Training Corps (ROTC) Distinguished Military Graduate; top 20% of Army ROTC graduates nationwide.
- Appointment: Cadet Battalion Commander, responsible for military and leadership development of 40 cadets.
- University of Wisconsin Triathlon Team's volunteer/fundraising coordinator.

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## PROFESSIONAL EXPERIENCE

**Walnut Brothers LLC, Des Moines, IA** 9/17 – Present  
*Business Owner*

- Co-founded Walnut Brothers LLC, a real estate investment company focused on buy-and-hold rental homes in Iowa.
- Acquired and updated two rental properties since February 2017; increased property value of first house by 20.3% and sold property after two years, and currently manage second rental property which generates a 19.5% return on investment.

**U.S. Army, 1st Theater Sustainment Command, Fort Knox, KY** 5/19 – 4/20  
*Headquarters Company Commander, Captain*

- United a company of 440 military and civilian service members and developed soldiers' mission readiness for four deployments by holding leaders accountable and by communicating clear goals and timelines to all organization members.
- Responsible for 3,393 pieces of Army equipment worth \$14 million located in two countries and delegated management of the equipment to 38 service members.
- Consolidated \$1 million of obsolete Army equipment for recycling by revitalizing the supply team's turn-in procedure and by exploring a new turn-in site; reduced time required to turn-in equipment from three days to one day.

**U.S. Army, Logistics Captains Career Course, Fort Lee, VA** 10/18 – 3/19  
*Student, 1st Lieutenant*

- Received advanced level training in company leadership, operational planning functions, and multi-functional logistics.
- Ranked number 1 of 109 Captains and Lieutenants based on academic, fitness, and leadership performance in the six-month course and graduated as the Distinguished Honor Graduate.
- Created four Army logistics calculators in excel to forecast fuel, maintenance, food/water, and medical requirements for sustained combat operations; resulted in the instructor incorporating the calculators into the course's resources for future Captains Career Course classes.
- Handpicked over 99 peers to be one of ten participants in the Sustainment Center of Excellence leadership board, an event where faculty orally tested participants on Army regulations, current events, and leadership quandaries.

**U.S. Army, 16th Sustainment Brigade, Baumholder, Germany** 9/15 – 9/18  
*Platoon Leader, Public Affairs Officer, Logistics Liaison Officer, 1st & 2nd Lieutenant*

- Directed a platoon of 50 soldiers in the execution of 116 transportation missions covering 80,000 miles across nine European countries to sustain military training.
- Orchestrated publication of 30 articles in various media and production of 20 hours of radio segments focusing on Army training in Europe; encouraged a network of leaders I assembled over two years to provide first-hand information and write articles on current Army operations.
- Chaired the Dragoon Ready sustainment planning effort; led a team of seven logistics experts to develop a sustainment plan for the training exercise, which featured approximately 1,000 military vehicles and 3,000 soldiers.

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## INTERESTS

- Endurance runner and triathlete; competed in five marathons and completed two ultramarathons.

# LIZ TRAUTZ

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## EDUCATION

### University of Wisconsin-Madison, Wisconsin School of Business, Madison, WI

2020 – 2022

*Master of Business Administration Candidate; Real Estate Specialization*

- Key Coursework: Real Estate Finance, Real Estate Valuation, Argus and Excel Modeling, Financial Management, & Data to Decisions
- Recipient: Forte Fellowship/Distinguished Graduate Fellow
- Selected as 2020-2021 Goldie Scholar
- GMAT: 690

### Colgate University, Hamilton, NY

2013 – 2017

*Bachelor of Arts*

- Major: Economics & Spanish
- NCAA Division I Women's Ice Hockey
- CIEE Spanish Immersion in Buenos Aires, Argentina
- Dean's Award for Academic Excellence

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## PROFESSIONAL EXPERIENCE

### Colliers International, Chicago, IL

09/2018 – 05/2020

*Investment Sales Marketing Coordinator*

- Directed marketing of commercial properties as part of top industrial sales team in Midwest, generating \$600 MM in annual sales
- Initiated new team projects and improved previous marketing efforts to further promote properties; including launching team website, revamping buyer tracking, and organizing large industry events; resulted in increased buyer pool
- Enhanced team's client relationships by implementing and customizing new customer database and keeping clients up to date on team activity
- Collaborated with senior brokers and financial analysts to execute deals by creating Offering Memorandums and Broker Opinion of Values; analyze letters of intent, abstract leases, and prepare sale comps to help facilitate building sales
- Selected as one of 200 mentees for Colliers Women's Diversity Program

### Colliers International, Chicago, IL

11/2017 – 09/2018

*Property Administrator*

- Managed portfolio of 20 industrial and office buildings under guidance of senior property manager, totaling over 4,500,000 square feet and 17 tenants, for several institutional investment companies
- Assisted in formulating yearly property budgets, totaling \$1 MM each in expenses and a combined \$4 MM in CapX
- Produced monthly financial reports, attended building tours, delivered rent statements, created service contracts, tracked insurance, and oversaw building inspections in order to maintain steady building operations
- Ensured tenant satisfaction by establishing and coordinating strong relationships with maintenance staff, contractors, and tenants
- Managed accounts payable and collaborated with property accountants to ensure vendors paid and rent received on time; resulted in overall decreased late fees

### Mid-America Real Estate, Minneapolis, MN

05/2016 – 08/2016

*Tenant Representation Intern*

- Interned for top retail broker in Minnesota, who received Broker of the Year Award in 2015
- Prepared lease comparables, letters of intent, marketing packages, maps, aerials, demographics, and other materials for retail clients, contributing to transaction closing
- Investigated ownership of retail properties and cold called business owners, generating additional prospective spaces and new clients
- Executed project leasing tasks, including showings and prospective tenant tracking

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## COMMUNITY INVOLVEMENT

- Salt and Light Coalition – Junior Board Member
- Make-A-Wish Illinois – Wish Granter

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## LANGUAGES AND INTERESTS

- Languages: Spanish
- Yoga instructor – RYT 200-Hour Certification