### Name, CFA

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# PROFESSIONAL SUMMARY

Institutional Sales professional with extensive experience developing and managing relationships with senior-level management and institutional investors in diverse industries, including Real Estate, Financial Services and Media & Communications. Proven track record of successfully working with clientele to develop and implement equity capital-raising requirements, such as New Issues, Initial Public Offerings (IPOs), and Follow-On Offerings. Strong corporate finance, business development and investor relations background. Keen business sense, with demonstrated ability to thrive in fast-paced, deadline-oriented environments.

# SKILLS & ABILITIES

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| --- | --- |
| * Extensive network of contacts within the global capital markets
 | * Demonstrated analytical and financial skills
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| * Strong understanding of the financial markets
* Relationship management & business development skills
 | * Excellent presentation and communication skills
* Ability to motivate and manage teams
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# CAREER EXPERIENCE

#### XYZ Company February 20xx – September 20xx

## Head, Business Development, Diversified Industries

* Refined and executed strategies to develop global awareness of XYZ Company
* Developed and managed business development strategies and budgets for the Diversified Industries sectors including the identification and evaluation of optimal tactics to attract new listings and bolster investor participation
* Maintained a strong understanding of the listing requirements and value proposition of listing on XYZ Company for the Diversified Industries sectors
* Developed and maintained an extensive relationship management program with market influencers (i.e. lawyers, bankers etc.) in both domestic and global markets
* Consistently built and delivered presentations and marketing communications to varying global audiences
* Acted as a positive ambassador to XYZ Company through consistent service levels
* Played key role in numerous equity transactions, including both small and large IPO’s ($50M - $1B), and Capital Pool Company (CPC) transactions
* Proficient at advising management teams throughout entire pre-IPO advisory process to optimize readiness and positioning for XYZ Company listing
* Business development efforts resulted in an increase in listings in the Real Estate sector from 82 to 110 over tenure and an increase in capital raised in the Real Estate sector by more than 60%

#### ABC Inc. May 20xx – January 20xx

## Senior Manager, Global Capital Markets Consulting

* Planned and executed research and consulting engagements for global capital markets clientele
* Wrote in depth research papers on client requested topics

#### Company Name February 20xx – May 20xx

## Manager, Corporate Strategy & Development

* Coordinated and conducted hypothesis-driven, fact-based quantitative and qualitative analysis of strategic business and investment opportunities
* Produced and guided the documentation of business plans and other recommendations to the Senior Management Team, Board and relevant external constituents
* Provided negotiating support on M&A/partnering activity, from valuation analysis through deal structuring
* Managed special project implementation teams through planning and execution phases
* Projects included the City Exchange Acquisition and the Bank Index business acquisition

#### DEF Technology July 20xx – February 20xx

## Manager, Investor Relations

* Developed and maintained comprehensive investor relations (IR) strategy
* Developed and monitored performance metrics and competitive analysis including financial metrics and peer differentiation
* Created presentations, press releases, and other communication materials for earnings releases, industry events, and presentations to analysts, brokers, and investors
* Spearheaded the production of all annual reports, SEC filings, and proxy statements
* Managed the IR portion of the company web site and served as key point of contact for investor community
* Monitors analyst reports and summarizes them for senior management
* Established and maintained relationships with stock exchanges
* Organized conferences, road shows, earnings conference calls, and investor meetings
* Provided feedback to management regarding investor perception of the company is being and their view of financial results
* Represented views of the investor community to the management team in the development of the corporate strategy

# EDUCATION & PROFESSIONAL DEVELOPMENT

## Honours Economics 19xx

* Name of University, City, Province

## Chartered Financial Analyst (CFA) 20xx

* CFA Institute

# TECHNICAL SKILLS

PowerPoint, Excel, Word, Capital IQ, Bloomberg