

CLIENT NAME

Business address

XYZ company
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City, State, Zip
E-mail (business) company@company.com

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EXPERIENCE SUMMARY

Partner at CONFIDENTIAL, a technology company specializing in data-mining and institutional financial web services. Daily roles are as Operations Manager for *Company A* (an aggregation and sales platform of independent financial research, specializing in soft-dollar payments) and Business Development for *Company B* (an Internet-based pricing and analytics system for High Yield bonds). Background as a distressed debt analyst with a BA from the University of California. Strengths include: Business Analysis, Project Management, and Partnership Strategies.

November 2005 – To Date

Co-Founder & Operations Manager for CONFIDENTIAL / COMPANY A New York, NY

Coordinate business operations and liaise between the sales and technology sides of the firm. Meet with prospective partners and key clients to assess project scope by designing new features and creating pricing schema for customization.

- Lead design, organisation and layout for the website UI and CMS system. The web-service has four distinct front-end versions: for research buyers and their purchase managers, research sellers, brokerage house sales and operations teams, and internal staff complete with multi-tier security access.
- Compose and negotiate sales contracts, partnerships and vendor agreements.
- Lead monthly strategy meetings for firm, reviewing sales strategies and technology performance.
- Train staff and focal end-users, internally and externally.
- Meet with vendors to understand their products/services, and then assist in generation of their profile (for marketing purposes as well as for data parsing) and write technical routines for uploading of research. Integrate and monitor products and business services being offered. Inform our sales staff on distinctions between content providers.
- Script and perform quality assurance routines and test to ensure website is functioning efficiently.
- Create marketing and training materials (both on paper and in video format), and write press releases.

January 2000 – To Date

Business Development for COMPANY B New York, NY

Lead the design, marketing and sales effort for HYmarket.com since its launch.

- Determine client needs, then design concepts for website and relay them to the Head Programmer, including: valuation tools (calculators and financial spreadsheet analysis), display formats (spreadsheets, graphs, page-layouts), and query tools to search and sort trade ideas in universe of high yield corporate bonds.
- Lead sales and marketing efforts.
- Oversee data quality assurance and customer satisfaction.
- Perform accounting functions including billing and collections, and do annual taxes.
- Monitor potential competitors and prospective business partners.
- Source new content providers.

Nov 1998 – June 1999

Analyst, UBS (Distressed Debt Department / CDO) New York, NY

Analyst supporting portfolio managers with \$1.2b in assets under management. Left when UBS merged with Warburg Dillon Reed because all assets in portfolio were sold.

- Prepared and presented investment recommendations of private and public debt.
- Modelled current and projected cash flow valuations in Excel.
- Monitored relative value and credit quality by conferring with Company management, speaking with analysts, following news and reading research reports.
- Interacted daily with salesmen and analysts.

Oct 1997 – Oct 1998 **Junior Analyst, Bankers Trust (Value Investment Group)** **New York, NY**
Hired to organize workflow in the bank's proprietary Value Investment portfolio; was Junior Analyst for the portfolio when left. Left when BT merged with Deutsche Bank because all assets in portfolio were sold.

- Modelled financials of prospective investments and comparative companies to assist portfolio managers.
- Initiated and created weekly summaries of portfolio performance and capital allocations.
- Entered trades, and handled discrepancies.
- Assisted in P&L.
- Accumulated information on prospective investments and industries.
- Kept portfolio managers advised on important dates.
- Interacted daily with salesmen and analysts.
- Implemented and maintained filing and reporting systems.

Sep 1996 – July 1997 **Associate, Winged Keel Group (Insurance benefits for Institutional Investment Bankers)** **New York, NY**
Hired as account manager. Became insurance contract specialist within the company, database manager, and also designed new business contract specs and implementation strategies for high census accounts.

- Designed sales and administrative templates, and programmed database reports.
- Analyzed profitability of marketing campaigns via database surveys.
- Created sales proposals and supported in negotiating of new business contracts.
- Answered complex policy questions for co-workers and outside clientele.
- Assisted in specialized software and hardware management, installation and training.

EDUCATION University of California, Santa Barbara: Baccalaureate of Arts in Philosophy, June 1996
Honors: Phi Sigma Tau, National Philosophy Honors Society
Head of Production Department, *Daily Nexus* (UCSB periodical)
Principal Oboist in the UCSB Symphonic Ensemble
UCSB Female Athlete of the Year 1996; Most Valuable Player of UCSB Varsity Sailing Team '94, '95' 96

SKILLS **Programming:** HTML; VBA; MySQL; XML/RXML; FIX Protocol (limited)

Software: LucidCMS; MS Office (Excel, Word, PowerPoint) and OpenOffice (Writer, Impress, Math); QuickBooks; TaxAct; ACT! as well as a proprietary contact management system developed in-house; Adobe; MS Paint; Inkscape; Yugma/GoToMeeting/Webex and other co-browsers; CamStudio

LANGUAGES English (fluent); French (proficient).

INTERESTS Competitive Sailing (World Champion in 2006 for Swan45 Class)
Play flute/oboe in Northern Westchester County Symphony and Putnam County Symphony
Volunteer at US Adaptive Recreation Center