

Jeffrey M. Levin

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EDUCATION

University of Miami, *Coral Gables, Florida*, Bachelor of Business Administration, *May 2017*

- **Major:** Finance; **Minor:** Accounting
- **Cumulative GPA:** 3.5/ 4.0
- **Relevant Coursework:** Financial Modeling, Mergers & Acquisitions, Investment and Security Markets, Corporate Financial Management, Fundamentals of Finance, Financial & Managerial Accounting, Intermediate Accounting, Business Analytics

Honors/Awards:

- **Bermont/Carlin Scholar** — Selected from over 100 applicants to be one of only 18 students awarded a fully funded trip to New York City to visit and network with companies in the financial services industry
- **Provost's Honor Roll and Dean's List**

PROFESSIONAL EXPERIENCE

Citigroup Inc.— *Corporate & Investment Banking, New York, NY, June 2017*

Citigroup Inc.— *Treasury & Trade Solutions, Liquidity Management Services Internship, New York, NY, June 2016-Present*

- Conducted market research on M&A activity, trends, volume, and synergies, and presented findings to senior management
- Built model used by sales, product and market managers that offers client account level details such as balance, product type, pricing, liquidity coverage ratio, return on asset, and variance
- Created template with key metrics for major banks to demonstrate Citi's performance in terms of balance sheet liquidity and earnings relative to competitors'
- Partnered with sales managers on an initiative to switch \$100MM in client balances from indexed to managed pricing accounts
- Responsible for updating and sending weekly reports of North America's liquidity management overview

UBS Financial Services Inc.— *Private Wealth Management Internship, Miami, FL, May 2015-Jan 2016*

- Perform Financial Goal Analyses to determine appropriate investment strategy for clients
- Conduct targeted equity research to assist Financial Advisors in evaluating investment opportunities and risks
- Analyze client asset allocations for re-balancing and help create portfolios to reflect clients risk tolerance and preferred investment strategy
- Design pitch books for prospective and existing clients including financial analysis models, asset allocations, equities, fixed income, and alternative investments for purposes of recommending appropriate solutions to match a client's risk tolerance and goals
- Selected as sole intern to work with Financial Advisors to manage existing client relationships and generate client leads

Fairholme Capital Management, LLC— *Investment Research Internship Program, Miami, FL, Aug-Dec 2014*

- Researched and evaluated hedge fund investments to understand basis for company decision-making in selecting investment options
- Performed fundamental research and analysis on target companies to help assess the proper value
- Designed organizational template of Sears Holding Corp for use by senior analysts for purposes of evaluating hierarchy, management, and structure
- Identified and collected data of Sears' real estate holdings to improve valuation process and accuracy

Hahnemann University Hospital— *Finance & Accounting Internship, Philadelphia, PA, May-Aug 2013/2014*

- Assisted in development of physician practice plan by identifying areas of improvement for service
- Managed financial cash log by processing daily bank deposits
- Responsible for distribution of monthly financial packages to directors for analysis and budget comparison

Washington Fine Properties— *Real Estate Internship Program, Washington, DC, Aug-Dec 2013*

- Performed sales analysis to assess the effectiveness of sales force compensation practices
- Measured averages from historical property data to determine market pricing of new properties
- Prepared residential real estate sales presentations for clients

SKILLS, ACTIVITIES & INTERESTS

- **Skills:** Microsoft Excel; Microsoft Powerpoint; Microsoft Word; Bloomberg
- **Organizations:** Sigma Chi Fraternity (Recruitment Chairman and Alumni Relationship Chairman); Christmas in July (Volunteer); Urban Oasis Projects (Volunteer)
- **Interests:** Golf; Fitness; Snowboarding; Fishing; Travel; Markets; Investing