

# Chase Morell

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## Education

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### University of Miami

*Bachelor of Science in Business Administration in Finance  
with Minors in Economics and Mathematics*

**Coral Gables, FL**

May 2019

- **GPA:** 3.83
- **Honors:** President's Scholarship Recipient, Provost's Honor Roll, Alpha Lambda Delta Honor Society
- **Relevant Coursework:** Introduction to Finance, Applied Probability and Statistics, Financial and Managerial Accounting, Game Theory, Macroeconomics, Calculus I/II, Business Analytics

## Professional Experience

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### León, Mayer & Co. / Endeavor Schools

*Private Equity Intern*

**Miami, FL**

May 2017 – Present

Constructed financial and valuation models to evaluate prospective acquisition opportunities and expand Endeavor School's existing portfolio of corporate and real estate assets

- Performed underwriting analysis by assessing pro-forma financials, evaluating asset-level return models and building draw schedules to support transaction and company financing activities
- Researched demographic and economic drivers to assess potential target acquisitions, performed due diligence on targets and confirmed necessary legal documentation to proceed with acquisitions
- Prepared investment presentations that highlighted key market and valuation analysis to prospective institutional investors, school-owners and the board of directors

### Worldwide Partner Operations, Citrix Systems

*Channel Analyst*

**Ft. Lauderdale, FL**

May 2016 - August 2016

Built and maintained advanced multidimensional models to measure and analyze key metrics for channel sales program performance and partner advancement

- Analyzed partner sales program performance globally, including cost, participation and effectiveness and created PowerPoint decks presented to and for use by senior management with executive officer
- Built dashboards to track partner reward opportunities and partner authorization level movements
- Initiated partner-wide processes to link Citrix certifications to accounts resulting in improved partner relations by creating analyses through Excel, SQL and Salesforce

### Channel Programs, Citrix Systems

*Competitive Analyst*

**Ft. Lauderdale, FL**

May 2015 - August 2015

Consulted internal and external sources to analyze and interpret industry intelligence from multiple databases and industry sources

- Provided competitive analysis for volume licensing and partner incentive programs
- Monitored product updates and competitor trends, including product, pricing and licensing changes
- Analyzed current competitors and anticipated changes, evaluated novel opportunities and provided up-to-date accurate competitive intelligence and reliable analysis

## Leadership Experience

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### University of Miami Economics Club

*Treasurer and VP of Speaker Committee*

**Coral Gables, FL**

Sept. 2015 - Present

- Prepared the club's budget, recorded and tracked all club expenditures and reconciled club records
- Recruited approximately 40% of current membership
- Organized and booked speaker events throughout the 2015-2016 school year, topics including: Careers on Wall Street, Emerging Bond Markets in Latin America and Successful Start to Investing

## Skills, Activities, & Interests

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**Technical Skills:** Microsoft Application, SQL, Tableau, R, Python, ESRI

**Activities:** Squash Team, Weightlifting Club, Pi Kappa Phi

**Interests:** Drumming, Rowing, Crypto-Currencies, Personal Investing, Baseball