

[Patrick Bateman]

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PROFESSIONAL EXPERIENCE

[Current Company ("JP Goldman")]

[City, State ("New York, New York")]

[Title / Group ("Investment Banking Analyst, Industrials")]

[Start – End ("Sep 2024 – Present")]

- [Summary: "(Second-Year Analyst in the Business Services coverage team with an M&A transaction focus)"]

• Selected Transaction Experience

- [Trnx detail ("xBn+ Acquisition of Public Engineering Services Company by Adjacent Competitor")]
 - [Illustrative Bullet 1 (Example (IB, M&A execution): "Led financial modeling for the \[Deal Size] acquisition of a [Target Company Description] by a [Acquirer Type], identifying [X synergies] that contributed to a [Y%] increase in projected EBITDA")]
 - [Example (Corp Dev/Strategy): "Created the investment thesis and financial model for a new market entry strategy, forecasting a [X%] ROI over 5 years and obtaining \[YMM] in initial funding")]
 - (Optional - aim for 3-5 strong bullets per recent role, 2-3 per project)
- Divestment of \$500MM Revenue Janitorial Services Segment to Larger Competitor
 - [Illustrative Bullet 1 (Example (IB, Valuation): "Executed comparable companies, precedent transactions, and DCF analyses, identifying a ~10% valuation premium to client expectations and directing focus on strategic acquirers")]
 - [Illustrative Bullet 2 (Example (Ops/Consulting): "Streamlined** [Specific Process, e.g., key manufacturing process] by implementing [New System/Methodology, e.g., Lean Six Sigma principles], resulting in a [X%, e.g., 20%] reduction in production time and annual cost savings of \[1.2MM].

[Prev. Job ("Middle Market Bank")]

[City, State ("Chicago, IL")]

Investment Banking Analyst, Generalist

Feb 2023 – Sep 2024

- [Summary: "Analyst involved in all aspects of industry-agnostic, lower middle-market M&A transactions ")]

• Selected Transaction Experience

- [Trnx detail ("MM Sale of HVAC Service Provider to Private Equity-Backed Strategic Acquirer")]
 - [(E.g., IB, Diligence): "Drafted teaser and CIM to highlight organic and inorganic expansion and areas for operational improvement opportunities; the final documents became team-wide templates")]
 - [(E.g., IB/Consulting - Communication): "Worked closely with management to build a 3-statement standalone operating model with multiple operating scenarios classifying 10,000+ internationally sold SKUs based on key strategic initiatives")]

[Other Job if Relevant ("Regional Consultant")]

[City, State ("Omaha, NE")]

[(E.g. "Operations Analyst", "Consulting Associate")]

Jun 2021 – Jan 2023

- [E.g., "Researched and assembled industry, competitor, and portfolio data to develop strategic ideas used in investment pitches for potential and existing clients that assisted with a ~\$750MM capital raise"... 1-2 more

EDUCATION (* detail below)

Blue Mountain State University

Appalachia, PA

Bachelor of Arts in Economics, ["Magna Cum Laude"]

Graduated May 2021

- [GPA]: 3.4 / 4.0; [Major GPA]: 3.8 / 4.0 Dean's List all Semesters
- [Honors and Awards, Key Coursework etc.]: Dean's List all Semesters, Financial Accounting....

SKILLS & INTERESTS (** detail below)

Technical Expertise/ Licenses: FactSet, PitchBook, S&P Cap IQ, Bloomberg; SIE, Series 63, and Series 79

Interests: Top 50 National Ranking in Men's Pickleball, New York Homeless Shelter Volunteer Co-President

REFERENCE NOTES TO USER (delete this section when using)

Job Experience Bullet Advice

- Start with a strong Action Verb like 'Led', 'Developed', 'Managed', 'Executed'. Describe a significant project or responsibility. What was the specific task or challenge? What was the scale (e.g., team size, budget, deal size)? What specific actions did YOU take? What were the quantifiable results (e.g., % increase, \$ saved, # achieved)? How did this demonstrate skills relevant to PE (analytical, financial, strategic, leadership)?]
- Think about another key achievement. Did you analyze something complex? Improve a process? Manage a critical relationship? What specific analytical tools or frameworks did you use? What was the direct, measurable impact of your work? How does this translate to evaluating or improving a business – key PE functions?
- What other accomplishments highlight your PE-relevant skills? Did you present to senior leadership? Manage stakeholders? Overcome a significant challenge? Always focus on *your* specific contribution and the *result*.
- Using the same Action Verb -> Task/Challenge -> Specific Actions -> Quantifiable Result/Impact framework, detail your key achievements from this role. How did this experience prepare you for PE, even if indirectly?
 - Focus on transferable skills: problem-solving, analytical thinking, project management, communication, leadership. Quantify where possible.

***Education Section Explanation / Modifications**

- Tailor the length of this if you have stuff to show off, especially if more recently out of college or don't have a ton of job experience
- Can consolidate multiple items into one category if space is running out (i.e. "GPA / Honors & Achievements")
 - Example Lines to include:
 - **GPA:** (Optional but Recommended if Decent / can show strong major or another type of GPA): e.g., "GPA: 3.7 / 4.0, Major GPA: 4.0 / 4.0"
 - **Honors/Awards:** (Be Specific):** e.g., Magna Cum Laude, Dean's List (X of Y semesters), [Specific Scholarship Name], [Academic Award Name].]
 - **Relevant Coursework:** (Especially if non-finance major or to highlight advanced work):** e.g., Corporate Finance, Financial Modeling & Valuation, Investment Analysis, Econometrics, Advanced Accounting. What courses directly built your PE toolkit?]
 - **Thesis/Major Project:** (If applicable and relevant):** e.g., Senior Thesis: "An Analysis of LBO Trends in the Software Industry." What did you research or build that shows PE-related thinking?]
 - **Study Abroad/Exchange Program:** (If applicable and adds value):** e.g., [University Name], [City, Country] – [Program Focus].]

****Skills & Interest Explanation / Modifications**

- Similar to education, if you are a more interesting person or really need to show some relevant PE modeling skills that is not demonstrated through your job experience
- Recommended to keep light and avoid redundancy (i.e. if you did banking, it is known you have "Advanced Excel Skills")
- Can also consolidate categories if space is running out (i.e. "Technical Skills / Licenses")
 - Technical Skills - Example Lines / Items to include:
 - **Financial Modeling:** [Be specific: e.g., LBO, DCF, 3-Statement Financial Models, Accretion/Dilution, M&A Models, Comps, Precedents. What types of models have you actually built or worked with extensively?]
 - **Valuation:** [e.g., Discounted Cash Flow, Comparable Company Analysis, Precedent Transaction Analysis, Sum-of-the-Parts. Which techniques are you proficient in?]
 - **Software:** [e.g., Microsoft Excel, PowerPoint, Word; Financial Databases (Capital IQ, PitchBook, FactSet, Bloomberg Terminal – specify which ones you've used meaningfully)]

- **Other Technical Skills:** e.g., Data Analysis (SQL, Python for data analysis – if applicable), specific industry software.]
- **Certifications & License**
 - [e.g., CFA Level I Passed (or Candidate for Level X), CPA, SIE, Series 79, Series 63. List all relevant and current credentials.]
 - *Assumed you are likely licensed if in investment banking at a larger bank already, but helpful if from a smaller / regional one*
- **Languages**
 - [e.g., English (Native), Spanish (Fluent), Mandarin (Conversational). Specify your proficiency level.]
- **Interests**
 - *Important icebreaker section, make it stand out if you can and add quantifying / award support if applicable*
 - [List 2-3 genuine and specific interests that show personality or desirable traits (e.g., discipline, analytical thinking, teamwork, intellectual curiosity). Avoid clichés.
 - Good Example: "Marathon Runner (Completed 3 marathons, PB: 3:XX)", "Competitive Chess Player (USCF Rating: XXXX)", "Volunteer Mentor for [Organization Name]", "Building and flying FPV drones".
 - Less Effective: "Reading, Movies, Travel".
 - What are you genuinely passionate about outside of work that might make you a more interesting candidate or colleague?

In Summary

- This template provides a structure and illustrative examples. **Your goal is to replace the examples and bracketed prompts with your own specific, quantified achievements.**
- Focus on the **Action Verb -> Task/Challenge -> Specific Actions -> Quantifiable Result/Impact** framework for every bullet point in your Professional Experience section.
- **Tailor this template** to the specific types of private equity roles and firms you are targeting. Emphasize the experiences and skills most relevant to each opportunity.
- Remember the **one-page rule** for most pre- and recent-MBA candidates. Be concise and impactful.
- **Proofread, we don't want errors**

Refer back to the UpLevered "[Crafting the Perfect Private Equity Resume](#)" guide on our blog for more detailed advice on each section and for strategies on spinning non-traditional experience. Good luck!