

James Talavera

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EDUCATION

California State Polytechnic University, Pomona - Cumulative GPA: 3.4 Pomona, California
Major: Bachelor of Science - Finance Class of 2019
Kaufman Fellows – Venture Deals (Brad Feld, TechStars, Kaufman Fellows collaboration)
Selected Coursework: Asset Allocation, Economic Statistics, Money and Banking, Applied Portfolio Management (FRL 499)

EXPERIENCE

J.P. Morgan San Francisco, California
Life Science Summer Analyst June 2018 – August 2018

- Worked on financial models to support financing transactions in the Life Science and For-Profit Healthcare Space
- Prepared marketing materials for client calls including financing alternatives, working capital optimization, and industry analysis
- Created research profiles on public and private companies involved in emerging CRISPR-Cas9 & CAR-T Therapy space

Bardi Co. Los Angeles, California
Spring Investment Banking Analyst February 2018 – May 2018

- Participate in deal team providing services including M&A advisory, capital raises, and private placements
- Assist with creation of CIM, Teaser, and other marketing materials for technology and media companies
- Created financial models including DCF Valuation, comparable analysis, market approach, and competitor research

Goldman Sachs Salt Lake City, Utah
Fall Account Management Intern September 2017 – December 2017

- Gather and analyze data to improve operational efficiency of Sales/Trading and Merchant Banking desks
- Took an active role in the lifecycle of transactions by implementing collateral management and maintenance of securities and cash
- Automated departmental reporting tasks for the Reference Data Operations team to improve operational flow and risk mitigation

First Republic Bank San Francisco, California
Business Banking Summer Analyst June 2017 – August 2017

- Constructed cash flow models and financial statement analyses for live deals in the healthcare sector
- Conducted market research in different industry verticals (Healthcare, Entertainment, Technology)
- Contributed to analysis of large entertainment/tech companies that led to approval of \$300MM+ credit facilities and syndications

Kaiser Permanente Oakland, California
Treasury Summer Analyst, Strategic Finance June 2016 – August 2016

- Collected, organized, and analyzed 2016 Q2 report of \$200M leased medical/IT equipment for Treasurer's review
- Presented relative cost structure findings on top solar energy contractors to build renewable energy fixtures on 15 hospital buildings
- Modeled lease costs of 10 medical office buildings to determine which acquisitions from lessors would be most beneficial

LEADERSHIP & PROFESSIONAL DEVELOPMENT

Finance Society Pomona, California
President May 2017 – Present

- Grew club to carry the largest membership base of all student clubs in the College of Business (60% growth in first year)
- Coordinated professional development services (workshops, guest speakers, community service)

Student Managed Investment Fund Pomona, California
Analyst August 2018 – Present

- Formulating, documenting and implementing the fund's inceptual investment thesis, traded securities on \$250,000 fund
- Determining target equity sector allocations relative to a selected benchmark using risk-return and optimization models

VentureCapital.Org Salt Lake City, Utah
Investor Liaison October 2017 – February 2018

- Evaluated pitch decks and offered feedback to improve deal attractiveness to potential investors
- Coached entrepreneurs on presentation style to help improve their pitch to VC, Angel, and other investors
- Assessed the credibility of business models, company valuations, and revenue projections

CFA Institute Research Competition Orange, California
Equity Research Analyst (Cal Poly Representative) November 2016 – March 2017

- Read through 10K, 10Q, 8K and other financial forms to arrive at conclusions about a commercial bank
- Presented findings, research report and investment recommendation to a panel of CFA charterholders in a competitive format

Other Affiliations: NASA-CPP Startup Program, SEO Career, Association of Latino Professionals for America

OTHER SKILLS & INTERESTS

Computer: Bloomberg, Capital IQ (CapIQ), FactSet, Pitchbook, Microsoft Office, R Studio, ARGUS

Other Interests: Tennis, Skiing, Cooking, Fluent in Spanish