

James Talavera

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EDUCATION

California State Polytechnic University, Pomona - Cumulative GPA: 3.3

Pomona, California

Major: Bachelor of Science, Finance, Real Estate, and Law

Expected Graduation: May 2019

Relevant Coursework: Asset Allocation, Business Law, Corporate Finance, Economic Statistics, Financial Accounting, Intermediate Accounting, Macroeconomics, Managerial Accounting, Microeconomics, Money and Banking, Principles of Statistics

EXPERIENCE

Bardi Co.

Los Angeles, California

Spring Investment Banking Analyst

Feb 2018 - Present

- 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
- Joined senior bankers in reach out calls and interviews with senior executives at private equity firms

Goldman Sachs

Salt Lake City, Utah

Account Management Fall Intern

Sep 2017-Dec 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 – Aug 2017

- Spread business financial statements, personal financial statements and HNW tax returns
- Constructed cash flow models and financial statement analyses
- Conducted market research in different industry verticals (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, Strategy Team

June 2016 – Aug 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

Jun 2017 – Present

- Coordinated professional development services (workshops, guest speakers)
- Delivered presentations on career tracks available to finance majors

VentureCapital.Org

Salt Lake City, Utah

Investor Liaison

Oct 2017 – Present

- Evaluated pitch decks and offered feedback to improve deal attractiveness
- 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)

Nov 2016 – Mar 2017

- Worked with a team of 5 students to analyze and value a small cap commercial bank
- Read through 10K, 10Q, 8K and other financial forms to arrive at conclusions about the company
- Analyzed the composition of target company loan portfolio to determine credit risk and exposure to potential charge-offs
- Presented findings, research report and investment recommendation to a panel of CFA charterholders in a competitive format

Other Affiliations: NASA-CPP, Salt Lake City Angels, Association of Latino Professionals for America, Real Estate Association

OTHER SKILLS & INTERESTS

Computer: Bloomberg, Capital IQ, Microsoft Applications (Excel, Word, PowerPoint & Outlook), R Studio

Language: Fluent in Spanish

Other Interests: Tennis, Skiing, Cooking