

Summary

Fixed income credit analyst with experience in fundamental and relative value analysis. Sector concentration in U.S. large cap banks, regionals, and insurers, European banks, finance companies, and specialty finance. Particular focus on subordinated and hybrid regulatory capital instruments with a focus on structural considerations. A motivated team player with excellent critical thinking and analytic skills. Level 2 CFA Candidate.

Experience

Morgan Stanley

Purchase, NY

Associate, Credit Trading Desk Analyst – MSWM Capital Markets

Feb 12 – Present

Primary focus on US and European bank credit across the capital structure. Responsible for generating and communicating credit trade ideas to Wealth Management clients with \$350bn of credit assets and to trading desk.

- Built trusted relationships with sales organization, Financial Advisor clients, and top-level firm WM clients.
- Published reports and video commentary for Financial Advisors establishing views on credits and securities
- Created and maintained fundamental models (regulatory capital, LTD footprint, asset quality, operating performance) and relative value models for covered companies in banking and insurance.
- Presented credit views at conferences, in meetings, and via conference calls to Financial Advisors and clients
- Partnered with banking and risk to conduct diligence reviews on new debt deals being marketed to Wealth Management clients.
- Developed and led training programs and teach-ins for sales and analyst training program

Analyst, Fixed Income Sales – MSWM Capital Markets

June 10 – Feb 12

Responsible for fixed income sales coverage of Financial Advisors in the Northeastern US

- Product coverage across IG, HY, preferreds, rates, MBS, FX, structured products, and municipal product areas.
- Proactively positioned trades against FA inquiry and client portfolios leveraging firm views and research
- Created and analyzed custom fixed income portfolios for high-net worth clients
- Conducted client / prospect meetings and conference calls to explain trades and position within client accounts

Summer Analyst, Fixed Income Sales – MSWM Capital Markets

June – August 09

Assisted fixed income sales and trading desk with client inquiry, trade support, and administrative functions.

Verizon Wireless

Basking Ridge, NJ

Intern – Reporting & Analysis

Summer 2007-2009

Supported various business intelligence and financial reporting functions including preparation and analysis of budget statements, competitive positioning, cost of acquisition/retention analysis, support of corporate reorganization, and Sarbanes-Oxley §404 compliance.

Education

University of Scranton

Graduated: May 2010

Scranton, PA

B.S. in Finance & Economics, minor in Accounting, GPA 3.91 (4.0 Index)

2008 *Study Abroad in China* (Beijing, Shanghai, Xi'an) emphasizing international business and culture

Academic Excellence: Business Leadership Program, Dean's List each semester

Honors: 2008 Kania School of Management Rose Kelly Award Recipient for Excellence in Academics and Campus Leadership, Dean's Scholarship, Omicron Delta Epsilon Economics Honor Society, Alpha Lambda Delta National Collegiate Honor Society

Leadership & Service: Student Government – Cabinet, Head of Student Investment Portfolio, President of Business Club (250+ members), Habitat for Humanity Finance Committee, President of Economics Honor Society, Treasurer of University Knights of Columbus Chapter

Technical Proficiencies

Advanced Excel skills, Bloomberg, Factset, Thompson, MS Office Suite, Visual Basic/Visual C# / VBA, SQL (Teradata, SQL Server, MySQL), PHP, Python, Ruby