

# Jessica Davis

CFA charterholder with six years in equity research and portfolio management. Skilled in valuation techniques, risk assessment, and client presentations. Known for producing reports that drove a 15% increase in client assets under management.

## CONTACT



(123) 456-7890



email@example.com



Portfolio



Chicago, IL

## EDUCATION

B.S. in Finance  
Boston College, Boston, MA, May  
2023

## KEY SKILLS

- Equity valuation
- DCF modeling
- Risk assessment
- Client presentations
- CFA charterholder

## PROFESSIONAL EXPERIENCE

EQUITY RESEARCH ANALYST | MERIDIAN CAPITAL, CHICAGO, IL  
SEPTEMBER 2018 – PRESENT

- Lead coverage of 10 technology stocks, delivering quarterly reports that informed \$100 million investment decisions
- Build DCF and LBO models in Excel to value companies, achieving 95% forecast accuracy
- Present findings to institutional clients, contributing to a 15% AUM increase

ASSOCIATE ANALYST | STERLING WEALTH, CHICAGO, IL  
JUNE 2016 – AUGUST 2018

- Supported senior analysts in sector-rotation strategies, improving portfolio returns by 4% annually
- Automated financial statement extraction, reducing data-prep time by 30%

## CERTIFICATIONS

- Microsoft Certified: Data Analyst Associate, Microsoft, August 2023