



JULIA HEEGAN

EDUCATION:

Bachelor of Science – Finance – Miami University (2022)

WORK HISTORY:

October 2022 – Present.

Technician – The Sage Group – Denver, Colorado

June 2022 – August 2022

Investment Banking Summer Analyst – Class VI Partners - Ownership and creation of financial projection models for Software-as-a-Service (SaaS), consumer goods, and niche manufacturing companies, responsible for continual updates of financial projection model and ad hoc client engagement financial analysis, drafting of all pre-market preparation deliverables including pitch materials, buyer lists, Confidential Information Memorandum (CIM), and management presentations, management of deal process to assist Associate to proactively advise clients on process deliverables, Go-To-Market timeline, and management of all third parties (attorneys, CPAs, QofE providers) and supported business development through extensive industry research.

May 2021 – August 2021:

Middle Market Commercial Banking Intern – Fifth Third Bancorp - Supported relationship manager and credit analyst in several functions including spreading, credit base analysis, and underwriting, executed borrowing base scenario analysis with different advance rates to provide client with access to additional revolver, spearheaded and facilitated intern training program for institutional services 401k research project intended to streamline current middle market clients based off their direct benefit and direct contribution plans, researched bancorp prospect, provided relevant industry analysis, and reviewed appropriate bancorp products to create client specific presentation given at site visit.

May 2020 – August 2020

Private Wealth Management Intern – Verde Capital Management - Executed equity research for 3 firm held companies and presented findings at quarterly investment committee meeting, collaborated with fellow interns to research and present key findings on global industrial and digital REITS and emerging markets.