

Megan E. Schwartz

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EDUCATION

University of Maryland

Robert H. Smith School of Business
Bachelor of Science in Finance

College Park, MD

GPA: 4.0

Expected: May 2025

Special Programs:

- **Wall Street Fellows** – 1 of 20 students selected to participate in a program that prepares students for Wall Street
- **Sophomore Finance Fellows** – Selective program for top students to participate in intensive finance courses

PROFESSIONAL EXPERIENCE

Morgan Stanley

Incoming Investment Banking Summer Analyst

New York, NY

June 2024 – August 2024

Morgan Stanley

Investment Banking Sophomore Summer Analyst
Global Power & Utilities Group

New York, NY

June 2023 – August 2023

- Constructed PowerPoint presentations for various clean energy deal clients covering weekly updates, potential transactions, market updates, and various financing opportunities to raise capital
- Assisted in updating spreadsheets with comparable company financials to provide holistic information to deal clients
- Engaged in daily meetings with clients to take notes and create plans for next steps to allow for a smooth deal process
- Completed an intern project consisting of a mini-merger model of a hypothetical transaction between 2 utility companies, including a DCF, accretion/dilution, comps, and precedents, and presented a pitch deck to team members

PerkinElmer

FP&A Summer Intern

Waltham, MA

June 2022 – August 2022

- Managed a project with a goal of creating an automated dashboard to keep effective real-time track of new project ROI
- Designed and presented weekly PowerPoints for the IT team, finance team, and VP of Finance to give progress updates
- Analyzed project data in Excel and collaborated with segment leaders to determine and investigate inconsistencies
- Presented and demonstrated the dashboard to the Chief Financial Officer and other finance members in the company

Dwell360 Real Estate

Marketing & Social Media Intern

Newton, MA

November 2020 – August 2021

- Conducted extensive research on a variety of topics in real estate including design trends, IoT, and home improvement
- Designed 30 social media and blog posts to increase online traffic, social media presence, and brand awareness
- Interviewed clients to create a video testimonial capturing their positive experiences and boost lead generation

LEADERSHIP EXPERIENCE & EXTRACURRICULARS

Smith Investment Fund

Research Analyst

College Park, MD

October 2021 – Present

- Competitively selected as 1 of 12 associates out of 70+ applicants for a student-run investment fund with \$10,000 AUM
- As CSO, planned an alumni event for alumni members and 20+ current members to foster networking and community
- Mentored 2 new members and provided weekly feedback on projects and advice about recruiting and future careers
- Created multiple stock reports on companies in various industries highlighting key fundamentals and financial metrics

Smith Finance Group Investment Banking Case Competition

2nd Place Winner

College Park, MD

November 2021

- Pitched a potential acquisition of iRobot (NASDAQ: IRBT) by Amazon (NASDAQ: AMZN) to the SFG executives
- Collaboratively constructed various financial models and a slide deck highlighting key findings and metrics in the deal

ADDITIONAL INFORMATION

Other Activities: Alpha Delta Pi, Alpha Kappa Psi, Consult Your Community, ibRecruit, Women in Finance Mentorship

Interests: Cape Cod, Kayaking, Musical Theatre, Whales, Rock Climbing