James Whitfield

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PROFILE

Penultimate-year Economics student at the University of Warwick (predicted First) seeking a summer internship in investment banking. Experienced in building simple valuation models through the finance society and in client-facing work at a wealth management firm.

EDUCATION

BSc Economics, University of Warwick

Predicted First (first-year average 73%) | Coventry | Sep 2023 – Jun 2026

- Modules: Mathematical Economics, Financial Economics, Econometrics, Macroeconomics

A-levels, Dulwich Park Sixth Form

*A*A*A | London | Sep 2021 – Jun 2023*

- Mathematics (A*), Further Mathematics (A*), Economics (A)
- 10 GCSEs at grades 9–7

EXPERIENCE

Insight Week Participant, Calder Wealth Partners

London | Apr 2024 – Apr 2024

- Shadowed portfolio managers and an analyst team across 5 days, attending client review meetings.
- Worked in a team of 4 to pitch a sector allocation to senior staff; the pitch was rated top of 6 groups.

Head of Equity Research, Warwick Finance Society

Coventry | Sep 2024 – Present

- Lead a team of 8 analysts producing fortnightly stock pitches with discounted cash flow and comparable company valuations.
- Run 6 Excel modelling workshops a term for around 40 first-year members.
- Edited the society's monthly markets newsletter, sent to 1,100 subscribers.

Sales Assistant, Kingsway Menswear

London | Jul 2022 – Sep 2023

- Achieved the highest personal sales in the store for 3 months of summer 2023 by building rapport with repeat customers.

SKILLS

Financial modelling in Excel, DCF and comparable company valuation, Bloomberg Market Concepts, PowerPoint, Python (basic)

CERTIFICATIONS

- Bloomberg Market Concepts (BMC), 2024

INTERESTS

- Rowing (college first VIII)
- Following M&A news and writing short deal summaries