

# JEFFREY I. AMBRIZ

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## EDUCATION

**University of California, Berkeley | 3.7 GPA | Harvard SVMP Alum** **Expected Graduation: May 2024**  
B.A. in Economics, Minor in Public Policy, Certificate in Entrepreneurship & Technology *Berkeley, CA*

**Sherman Oaks Center for Enriched Studies | 4.09 GPA** **August 2016 – June 2020**  
• *Activities:* Senior Class President, ASB Vice President, Varsity Volleyball, Academic Decathlon *Los Angeles, CA*

## PROFESSIONAL EXPERIENCE

**The Carlyle Group** **Start Date: June 2023**  
*Current Summer Analyst* *New York, NY*

**Bregal Sagemount** **July 2021 – June 2023**  
*Private Equity Intern* *New York, NY*

- Responsible for managing diverse tasks such as deal sourcing, overseeing the deal flow database, creating pitch decks for prospective investments and fundraising, investment memo editing, and various other responsibilities
- Identified relevant comparable companies, transaction comparables, and potential PIPE candidates for various deals
- Oversaw 5 interns, providing guidance and training; served as the primary liaison between the interns and the IPs
- Selected Transaction Experience:

### ***Growth Investment in Software Development Services Provider (Transacted)***

- Performed an extensive examination of employee job histories and departures to evaluate the extent of potential investment risk associated with the career movement of full stack professionals
- Generated a comprehensive Excel analysis by leveraging LinkedIn attrition reports, highlighting attrition percentages, workforce growth, and implied churn for similar firms in unique geographical regions
- Identified potential M&A targets for the firm's growth strategy by conducting extensive market research

### ***Growth Investment in FinTech Payment Processing Solutions Firm (Transacted)***

- Evaluated potential risks to the target company through performing an in-depth analysis of the firm's merchant base by compiling each merchant's BBB rating and categorical descriptions
- Uncovered a pattern of frequent potential fraudulent accounts on the firm's platform during evaluation

### ***Growth Investment in Nutritional Analysis and Regulatory Compliant Labeling Software (Terminated)***

- Conducted market volatility analysis by analyzing 10,000+ NAICS data points, enabling the identification of key trends and patterns that could potentially impact the target company's customer base
- Engaged in due diligence calls and crafted presentation materials for our introduction to the target firm

**JPMorgan Chase & Co.** **June 2022 – July 2022**  
*Corporate and Investment Banking Summer Fellow* *New York, NY*

- Completed a six-week long intensive learning curriculum that included financial modeling and trading simulations, spanning across the Investment Banking and Markets tracks
- Executed a case study of an M&A transaction, providing analysis from the perspective of the Equity Capital Markets team
- Advised a Minority Depository Institution by providing solutions to combat predatory lending practices

**Alexander/Hanson Tax and Accounting** **January 2018 – February 2020**  
*Tax and Accounting Intern* *Los Angeles, CA*

- Compiled and inputted payroll data; organized excel spreadsheets, e-files, and IRS forms; helped grow number of clients from 25 to 300+ through various marketing strategies

## EXTRACURRICULAR/LEADERSHIP EXPERIENCE

**California Golden Bears Football (NCAA Division 1)** **May 2021 – Present**  
*Recruiting and Player Personnel Intern* *Berkeley, CA*

- Scout and recruit high school athletes nationwide, coordinate gameday recruiting operations and campus visits, and design impactful recruiting graphics using Photoshop; contributed to improving transfer portal ranking YoY from 56th to 16th

**Latinx Business Student Association** **August 2020 – Present**  
*Investment Committee Member* *Berkeley, CA*

- Covered the technology sector and analyzed multiple equities through research, presented a notable equity pitch to the board/fellow committee members and achieved a +7.3% return within the first two weeks of investment

**Sherman Oaks Center for Enriched Studies Class of 2020** **April 2019 – June 2020**  
*Senior Class President* *Los Angeles, CA*

- Led the entire Senior Class of 2020 while also managing a budget of over \$50,000 by examining areas of needed allocation
- Oversaw day-to-day operations, planned and organized all major senior events, negotiated with admin and district officials

## INTERESTS/SKILLS

**Interests:** College Football, Antitrust, Milano Cookies, Atlanta-Based Hip hop, Wikipedia Rabbit Holes, Mentorship, Golf

**Skills:** SourceScrub, Capital IQ, Excel, Salesforce, PowerPoint, Python (NumPy), Quickbooks, LaTeX, Adobe Photoshop