

# Brett R. Smith

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## EDUCATION

### The Ohio State University, Max M. Fisher College of Business

Columbus, OH

*Bachelor of Science in Business Administration with Honors*

*Expected: May 2025*

- **Specializations:** Accounting & Finance **Minor:** Economics GPA: 3.98
- **Fisher Futures Investment Banking Program:** 1 of 30 students in a highly competitive, faculty-selected program that educates students in investment banking, financial modeling, and business valuation
- **Accounting Honors Program:** 1 of 28 students selected to participate in Fisher's two-year program focusing on enriched accounting education, oral communication, and teamwork

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## WORK EXPERIENCE

### Citizens Financial Group

Boston, MA

*Investment Banking Summer Analyst*

*May 2024*

- Incoming 2024 Summer Analyst

### Advantice Health: TA Associates Portfolio Company

Bridgewater, NJ

*Finance & Accounting Intern*

*June 2022–December 2022, May 2023–Present*

- Created a 13-week cash flow model which reduced expected annual interest expense by \$200,000
- Executed EBITDA, free cash flow, and debt-covenant analysis for a private equity portfolio company
- Forecasted future 18 months of cash interest payments accounting for a 2.56% rise in SOFR rates
- Evaluated financial statements and LE1 projections to calculate \$20.5 million in free cash flow

### Fisher Global Non-Profit Consulting

Chiang Mai, Thailand

*Consulting Intern*

*May 2023*

- Selected as 1 of 6 students for a global consulting project assisting an ethical elephant foundation
- Conducted website & social media enhancements, which improved tourism engagement by 136%

### Ventura Wealth Management

Yardley, PA

*Wealth Management Intern*

*June 2022–July 2022*

- Performed investment research for a wealth management firm with over \$850 million in AUM
- Presented 6 research projects to firm partners on bear market scenarios concerning inflation fears

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## LEADERSHIP & INVOLVEMENT

### Buckeye Ventures

Columbus, OH

*Principal: Private Equity Consumer Sector*

*September 2022–Present*

- Contributing to weekly presentations to the 67-member general body with emphasis on PE and VC
- Developing and teaching a learning series to 24 new members emphasizing the PE consumer sector

### Deloitte Career Launch

Columbus, OH

*Exclusive Participant*

*September 2022–April 2023*

- Selected as 1 of 60 students to engage in partner-led modules covering management and leadership
- Partaking in modules on soft skills, focusing on recognizing business-related strengths & weaknesses

### The Investment Banking Program

Columbus, OH

*Student Member*

*September 2022–November 2022*

- Engaged in a strategic 15-week training program that provided an understanding of investment banking, including the history of the industry, analyst responsibilities, and valuation methodologies
- Completed DCF, comparable companies analysis, and precedent transactions analysis for Activision Blizzard and Microsoft acquisition analysis and presented results for a capstone case competition

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## CERTIFICATIONS & INTERESTS

- **Wall Street Prep Financial Modeling & Business Valuation:** Includes DCF, comparable companies analysis, precedent transactions analysis, M&A, and LBO
- **Interests:** Fantasy Football, NY Sports, Physical Fitness, Performance Psychology, Skiing, Soccer