

Jake Rose

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EDUCATION

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

Columbus, OH

Bachelor of Science in Business Administration: Finance

Expected: May 2025

Minors: Engineering Sciences, Business Analytics

GPA: 4.00/4.00

Awards: Land Grant Opportunity Scholarship, Maximus Scholarship

- **Integrated Business and Engineering Honors Program (IBE):** One of 18 business majors admitted to an interdisciplinary honors program. The program emphasizes the connection between business and engineering through innovation, problem-solving, corporate strategy, and teamwork with MBA-style courses
- **Fisher Futures Investment Banking Program:** 1 of 30 students in a highly competitive, faculty-selected program that educates students in investment banking, financial modeling, forecasting, and business valuation

PROFESSIONAL EXPERIENCE

J.P. Morgan

San Francisco, CA

Incoming Investment Banking Summer Analyst

June 2024 – August 2024

Copper Run Capital

Columbus, OH

Investment Banking Intern

May 2023 – August 2023

- Conducted extensive market research to identify 150+ middle-market companies for strategics, sponsors, and platform businesses, using resources such as Pitchbook, S&P Capital IQ, and IBISWorld to evaluate specific M&A investment criteria
- Developed comprehensive financial statements for family-owned businesses with limited or outdated accounting systems, enabling improved financial analysis and evaluation, prompts for future discussion on engagement calls, and facilitating the transaction
- Created detailed industry M&A and trend reports, providing valuable insights into recent transactions, multiples, and developments

Ochsner Health

New Orleans, LA

Financial Analyst Intern

May 2022 – July 2022

- Developed financial models and projections to support improved quality and cost-effective care for over 500,000 patients
- Researched 40+ Accountable Care Networks, assessing their suitability for a merger or acquisition within the next 3-5 years through scenario modeling to calculate the contributed financial value to Ochsner Accountable Care Network
- Analyzed historical financial data and forecasted Ochsner's startup health plan to identify KPI trends for 2022 and 2023, discovering a 95% increase in attributed members and a 97% increase in revenue over the following 2 years

LEADERSHIP AND INVOLVEMENT

Cardinal Health Gene Therapy Dashboard

Columbus, OH

Team Lead/Primary Liaison

January 2023 – April 2023

- Directed a cross-functional team of students in the design and implementation of a gene therapy dashboard for Cardinal Health, enabling data analysis of the trends of 2,500+ trials while gaining experience in Microsoft Excel, Tableau, and SQL
- Facilitated regular communication between Cardinal Health and the project team, ensuring alignment of goals and progress updates

President's Buckeye Accelerator

Columbus, OH

Finalist

January 2023 – March 2023

- Pitched and led a SaaS platform (Vision2Health) to increase the efficiency of the medical risk adjustment process
- Achieved finalist status, top 11 out of 50+ teams, becoming eligible to compete for \$50,000 in funding and present to 200+ people
- Conducted market research and assisted in the development of a chatbot able to reference risk coding guidelines using LangChain

Quantitative Finance Club

Columbus, OH

Treasurer

August 2022 – Present

- Supported and led a small group of 15 students with a passion for quantitative finance, learning about the fundamentals of the field, statistical modeling, mock technical interviews, and integration of Python with algorithmic trading

IBE Product Development

Columbus, OH

"WalletAssist" CEO

January 2022 – April 2022

- Led a team to design a technical device to increase the independence of life for those with upper limb deficiencies
- Monitored team members' responsibilities, set agenda for team meetings, ensured submission of assignments, conducted market/competitive analysis, built a 5-year income pro forma, and refined 75+ presentation slides for all tasks and report-outs

SKILLS AND INTERESTS AND CERTIFICATIONS

- **General:** Big Data, Escape Rooms, Healthcare, Hebrew, Investing, Poker, Soccer, Spanish, Startups, Zumba
- **Software:** Microsoft Excel, Tableau, Microsoft Office, R, Python, MATLAB; familiar with CAD, C, C++, JS, and SQL
- **Certifications:** FINRA Securities Industry Essentials, NASAA Series 66 Exam, Wall Street Prep Financial Modeling & Valuation, Bloomberg Market Concepts, Akuna Capital Options 101, CITI HSP, CITI RCR