

# Kurtavya Joshi

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## EDUCATION

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

Columbus, Ohio

*Bachelor of Science in Business Administration*

May 2025

**Specialization:** Finance

**GPA:** 3.5/4.00

- **Fisher Futures Investment Banking Program:** 1 of 30 students in a highly competitive, faculty-selected program which educates students in investment banking, financial modeling, forecasting, and business valuations
- **Finance Honors Program:** 1 of 30 students selected by top finance faculty to participate in a competitive two-year academic honors program focused on applying analytical and critical thought within finance
- **Fisher First Program:** 1 of 40 students in a highly selective enrichment program for first-generation college students studying business, aimed at enhancing skills and facilitating a smooth transition into college

## PROFESSIONAL EXPERIENCE

### Canaccord Genuity – Sawaya Partners

New York, New York

*Incoming Investment Banking Summer Analyst*

May 2024 – August 2024

- Consumer Sector

### Blackford Capital

Grand Rapids, Michigan

*Private Equity Summer Analyst*

May 2023 – August 2023

- Sourced and screened new acquisition opportunities in line with Blackford's investment criteria and add on mandate
- Due diligence analysis and financial modeling (LBOs) to build cases for potential acquisitions and deal team needs
- Created CIMs tailored for investment committee evaluation and presentation to LPs and lenders, highlighting the investment opportunity, market research, potential returns, and risks

### Xenon Partners

Columbus, Ohio

*Mergers and Acquisitions Intern*

June 2021 – December 2021, June 2022 – August 2022

- Conducted extensive market research on VC portfolios to identify over 500 B2B SaaS companies as acquisition leads
- Communicated effectively with startup CEOs to identify and evaluate potential acquisition opportunities
- Optimized our CRM by automating outreach email campaigns, resulting in a 50% increase in prospect engagement

## LEADERSHIP & INVOLVEMENT

### Gamma Iota Sigma

Columbus, Ohio

*Head of Recruitment*

February 2023 – Present

- 1 of 18 students selected to engage in an intensive 7-week program focused on building strong professional skills
- Led the fall recruitment campaign for the business fraternity by implementing a targeted outreach strategy, engaging information sessions, well-organized recruitment events, as well as coordinating with current members and potential new members
- Engaged in weekly developmental sessions with guest speakers, workshops, and presentations on various business industries

### Buckeye Capital Investors

Columbus, Ohio

*Technology Vice President*

August 2022 – Present

- 1 of 24 students selected from over 150 applicants to complete a new member program focused on financial accounting, macroeconomics, fundamental analysis, portfolio management, and valuation methodologies
- Develop comprehensive pitches utilizing DCF, comparable companies' analysis, and risk analysis techniques to evaluate TMT sector companies for an annual club-wide stock pitch competition
- Participate in discussions on market updates and various topics during weekly coverage group and general body meetings

### Buckeye Ventures

Columbus, Ohio

*Senior Vice President/New Member Education Team Lead*

October 2021 – Present

- Arrange events and manage relationships with other student organizations, VC/PE firms and local startups
- Spearheaded recruitment efforts in SP 2022, resulting in over 100% growth in club membership from 30 to 65
- Assembled a team to develop a new member learning series on VC/PE which led to higher member retainment

### The Investment Banking Program

Columbus, Ohio

*Student Member*

March 2022 – October 2022

- Partook in a strategic 15-week curriculum committed to providing 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 the sale of Activision to Microsoft and presented results to program coordinators for a capstone case competition

## SKILLS & CERTIFICATIONS

**Wall Street Prep Certification in Financial & Valuation Modeling:** Certification in financial modeling and valuations including DCF, LBO, M&A, precedent transactions, and comparable companies

**Languages:** English, Gujarati, Hindi

**Interests:** Basketball, Chess, Cooking, Football, Movies, Poker, Traveling, Trivia, and Weightlifting