

# Max Isaacman

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## EDUCATION

### The Ohio State University

Columbus, Ohio

*Bachelor of Science in Business Administration*

May 2024

- **Specializations:** Finance and Economics **GPA: 3.99**
- **Fisher Futures Investment Banking Program:** 1 of 28 students in a highly competitive, faculty-selected program that exposes students to investment banking, financial modeling, forecasting and business valuation
- **Honors Cohort Program:** 1 of 35 students selected to participate in Fisher's flagship two-year academic program focused on leadership, service, interpersonal skills and critical thinking through experiential learning
- **Pace Setters Award:** Awarded to the top 1% of Fisher students for academic performance, leadership, and service

## PROFESSIONAL EXPERIENCE

### Houlihan Lokey

New York, New York

*Investment Banking Summer Analyst*

May 2023 – August 2023

- Financial restructuring group

### T. Rowe Price

Baltimore, Maryland

*Equity Research Summer Analyst*

June 2022 – August 2022

- Initiated coverage on two \$25bn+ industrial distributors and recommended ideas to senior equity analysts
- Wrote a report on the industrial distribution industry by analyzing eight companies and recent macro developments
- Built full financial models and completed intrinsic and relative valuations for multiple industrial distributors

### Blueprint Equity

San Diego, California

*Analyst*

February 2021 – July 2021

- Conducted market assessment and customer retention analysis to help lead \$8MM Series A investment
- Assisted with weekly customer churn analysis, forecasting and valuation of portfolio and pipeline companies
- Managed Salesforce database of 15,000+ companies to source those that meet Blueprint's criteria

### Teak and Deck Professionals

San Diego, California

*Sales and Marketing Intern*

May 2020 – August 2020

- Developed a new CRM software program to automate day-to-day operations through Zoho Campaigns
- Created models in Excel to show future revenue from 3,500 residential and 2,000 commercial customers
- Organized database of 6,400 contacts to improve efficiency when running marketing campaigns

## LEADERSHIP AND INVOLVEMENT

### Buckeye Capital Investors

Columbus, Ohio

*President, Former Media and Communications Managing Director*

September 2020 – Present

- Lead over 90 undergraduates in a student organization focused on investing philosophies and strategies, financial accounting, macroeconomics, fundamental analysis, portfolio management, and valuation methodologies
- Manage the Scarlet Alpha Management Fund, a paper portfolio tracking equity investments pitched by organization members, supervise equity research with sector leaders, and analyze & present fund performance to the club

### The Investment Banking Program

Columbus, Ohio

*Student Coordinator*

March 2021 – December 2022

- Taught a 15-week course to 85+ OSU students to prepare them for a career in the investment banking industry
- Designed weekly presentations and course curriculum to provide case-based learning related to recent economic events and oversaw a four-week case competition related to Microsoft's acquisition of Activision Blizzard

### TAMID

Columbus, Ohio

*Project Manager*

September 2020 – September 2021

- Led a team of 6 OSU students in a semester-long market research project for an Israeli startup

## CERTIFICATIONS & INTERESTS

- **Wall Street Prep Financial Modeling & Business Valuation Certification:** Certification in financial modeling and valuations including DCF, LBO, M&A, precedent transactions, and comparable companies' analysis
- **Interests:** Cooking, contemporary documentaries, golf, non-fiction books, running, surfing