

Max J. Boulton

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EDUCATION

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

Columbus, OH

Bachelor of Science in Business Administration

May 2024

GPA: 3.83/4.0

- **Specialization:** Finance **Minor:** Economics
- **Maximus Scholarship:** Merit-based scholarship awarded to the top 3% of high school seniors
- **Fisher Futures:** Highly competitive, faculty-selected program that exposes students to investment banking, financial modeling, forecasting, and business valuation
- **Investment Banking Program:** 15-week curriculum with a comprehensive training program focused on discounted cash flow models, comparable company analysis, and precedent transaction analysis.

WORK EXPERIENCE

William Blair

Chicago, Illinois

Investment Banking Summer Analyst (Tech-Enabled Services)

May 2023 – July 2023

- Supported in the creation of pre-pitch materials for a forensic insurance consulting firm
- Created discussion materials and comparable company analyses for an AI outsourced-services company
- Constructed the pre-pitch LBO model and discussion materials for a non-standard auto insurance broker
- Accepted a full time offer with a July 2024 start date

Caldwell Sutter Capital

Columbus, Ohio

Investment Banking Intern

July 2022 – September 2022

- Structured municipal, housing, and private placement healthcare debt issuances using the Munex software
- Reviewed issuer cash flows and pro-formas to analyze municipal and healthcare developer credits
- Acted as the analyst on a municipal bond issuance, performing administrative tasks and modeling

Finance|able

Remote

Investment Banking Content Specialist

June 2021 – November 2021

- Aided in the ongoing creation of a technical and behavioral investment banking interview guide
- Supported the release of crash course blogs while improving SEO for better audience exposure

Saint-Gobain Life Sciences

Solon, Ohio

M&A Intern

May 2021 – August 2021

- Managed data room and executed due diligence on a strategic acquisition in the life sciences industry
- Created a three statement model and discounted cash flow model to support prospective acquisition
- Screened and researched comparable companies in the life sciences industry for potential strategic fit
- Performed industry research on a niche healthcare sector, focusing on precedent transactions
- Created a PowerPoint summarizing industry research for a presentation to C-suite executives

ACTIVITIES & INVOLVEMENT

Phi Gamma Delta Fraternity

Columbus, Ohio

Brotherhood Committee

November 2021 – Present

- Organized weekly brotherhood events, such as paintballing and baseball games using a \$5,000 budget

Buckeye Capital Investors

Columbus, Ohio

Healthcare Sector Vice President

February 2021 – Present

- Engaged in weekly market and economic discussions focused on the healthcare sector
- Participated in the club's new member development series focused on market concepts
- Executed intrinsic and relative valuations of a healthcare stock during the biannual sector stock pitch
- Pitched a small cap consumer discretionary stock to current investment bankers

INTERESTS & Certifications

Interests: Cleveland and Ohio State Sports, Cooking, Traveling, Lifting

Certifications: Wall Street Prep Certification in Financial & Valuation Modeling