

Sam Schmidt

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EDUCATION

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

Columbus, OH

Bachelor of Science in Business Administration

May 2025

- **Specialization:** Finance | **Minor:** Real Estate | **GPA:** 3.97 | **ACT:** 35
- **Maximus Scholarship Recipient:** awarded to top 3% of incoming Ohio State students
- **Finance Honors Program:** 1 of 27 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 Futures Investment Banking Program:** 1 of 30 students in a highly competitive, faculty-selected program that exposes students to investment banking, financial modeling, and business valuation

WORK EXPERIENCE

Cain Brothers

New York, NY

Incoming Investment Banking Summer Analyst

May 2024 – August 2024

Carnegie Investment Counsel

Cleveland, OH

Wealth Management Intern

May 2023 – August 2023

- Researched and presented equities to investment committee, including United Rentals (URI) which became one of most widely purchased stocks across client accounts during summer tenure
- Analyzed firm's mutual fund holdings and put portfolio managers into lowest expense ratio funds
- Trained across capabilities in Bloomberg Terminal including equity tracking and fixed income research

Taza: A Lebanese Grill

Woodmere, OH

Patio and Dining Room Server

May 2022 – August 2022

- Served up to 20 tables each shift and coordinated orders between front of house and kitchen staff
- Greeted guests and provided excellent dining experience during high stress shifts on weekends

ACTIVITIES & INVOLVEMENT

Pi Sigma Epsilon Professional Business Fraternity

Columbus, OH

General Member

September 2022 – Present

- Engage in weekly professional development workshops discussing networking, resume tips, interviews
- Individually awarded first place in Fisher Sales Case Competition out of 70 participants

Buckeye Capital Investors

Columbus, OH

Associate / Media and Communications Sector

September 2021 – Present

- 1 of 24 students selected from over 200 applications to complete a new member training program focused on financial accounting, portfolio management, and valuation methodologies
- Completed a DCF, Comparable Companies & Precedent Transaction Analysis, and Risk Analysis for Comcast, Qualcomm, and News Corp as a part of club-wide stock pitches

Ohio State Club Squash

Columbus, OH

Co-President / Player Coach

July 2021 – Present

- Direct fundraising efforts with Ohio State alumni and organize matches with other schools
- Coordinate trips to other locations and arrange accommodations for nine other students on team

The Investment Banking Program

Columbus, OH

General Member

April 2022 – October 2022

- A strategic 15-week curriculum dedicated to preparing first year undergraduate students for a career in the investment banking industry at the leading investment banks
- Finished a training program that provided an understanding of the fundamentals of investment banking

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
- **Interests and Hobbies:** *Dune*, Golfing, Michael Lewis Books, Pickleball, Running, *Succession*