

DANIEL WHITFIELD

New York, NY • (917) 555-0198 • daniel.whitfield@email.com • linkedin.com/in/danielwhitfield

SUMMARY

Investment Banking Analyst with 3.5 years of experience in the Technology and Healthcare coverage groups at a bulge-bracket bank. Executed 10+ M&A, financing, and strategic advisory transactions totaling \$9.5B in aggregate value. Expert in financial modeling (DCF, LBO, merger models, comps), valuation, and client-ready materials; consistently ranked in the top bucket in analyst reviews.

EDUCATION

Bachelor of Science in Economics and Finance, The Wharton School, University of Pennsylvania 2022
GPA 3.8 | *Dean's List*

PROFESSIONAL EXPERIENCE

Investment Banking Analyst, Technology M&A Jul 2022 – Present
Meridian Capital Partners — New York, NY

- Executed 7 sell-side and buy-side M&A transactions with aggregate value of \$7.2B, including a \$2.1B take-private for a software company.
- Built merger, LBO, and DCF models and conducted comps and precedent analysis to support valuation and fairness discussions.
- Prepared CIMs, management presentations, and board materials; coordinated due diligence with legal, accounting, and 40+ buyer contacts.
- Supported a \$650M follow-on offering and \$400M term loan refinancing for sponsor-backed clients.
- Trained and mentored 4 incoming analysts and summer interns on modeling standards and deal execution.

Summer Analyst, Healthcare Investment Banking Jun – Aug 2021
Redwood Securities — San Francisco, CA

- Built DCF and trading-comps models for 3 live healthcare services transactions.
- Authored industry reports on digital health and medtech used in 5 client pitches.
- Received full-time offer and top-quartile ranking among 22 summer analysts.

SELECTED TRANSACTIONS

Project Atlas: Sell-side advisor on \$2.1B take-private of a SaaS company by a leading sponsor (2025)

Project Meridian: Buy-side advisor on \$1.4B acquisition of a healthcare IT platform (2024)

Project Summit: \$650M follow-on offering and \$400M term loan refinancing for a sponsor-backed software company (2023)

LEADERSHIP & ACTIVITIES

Co-President, Investment Banking Club (120 members); Teaching Assistant, Corporate Finance; Volunteer, Junior Achievement of New York

SKILLS & LICENSES

Technical: DCF, LBO, Merger Models, Accretion/Dilution, Trading & Transaction Comps, Precedent Transactions, Financial Statement Analysis, Pitch Books, CIMs, Management Presentations

Tools: Excel (Advanced), PowerPoint, FactSet, Capital IQ, Bloomberg, PitchBook, Refinitiv, VBA

Licenses: Series 79 and Series 63; CFA Level II Candidate; Wall Street Prep Premium Certification