**ROAR FICTIONAL CLIENT INFORMATION**

**Client:** Gustave (Gus) Bender

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After a successful 18-year career on Wall Street, Gus Bender has decided to shift gears. He is in the process of relocating back to the DC area, where he grew up, to be closer to his extended family. He also wants to use this opportunity to switch from the corporate sector to a nonprofit management role. He brings considerable skills in investment banking and portfolio management, fundraising and charitable program experience, and a passion for making an impact in underserved communities through business education. He has asked you to write his resume.

Born and raised in Alexandria, Virginia, Gus attended American University, earning his BS in Finance at the Kogod School of Business. While at American, he earned a 3.87 cumulative GPA (achieving a perfect 4.0 in his 3 semesters of undergrad). He earned inclusion in several honor societies: Golden Key, Beta Gamma Sigma, and Epsilon Chi Omicron. As a member of the Undergraduate Senate, Gus served on the Special Committee on Finance and was also a member of the Zau Beta Tau fraternity – holding the leadership role of Treasurer for 2 years. Through his involvement in ZBT, Gus was involved with countless volunteer and fundraising efforts for a variety of causes, supporting the Make a Wish Foundation, Paul Newman’s Hole in the Wall Gang camps, Covenant House’ Sleep Out to raise awareness of homelessness, Red Cross blood drives, etc. – even organizing his brothers at ZBT to form a charity walk team to raise more than $4,500 for the American Cancer Society. Gus loved nothing more than to use his natural leadership ability and growing influence on campus to galvanize support for important causes and help create community among diverse groups on campus. One of the highlights of Gus’ college career was a study-abroad opportunity in South America during the spring semester of his junior year. Having studied Spanish throughout high school and his first 3 semesters of college, he was excited to travel to Santiago, Chile and Buenos Aires, Argentina for the program, which was focused on international business and economics. To pay for the experience, Gus started a part-time tutoring practice and worked full-time during the summer after his sophomore year, doing grounds maintenance at the Edgewood drug rehab facility, operated by his uncle in Rhode Island.

During his senior year, Gus completed an internship for Crestlake, working with 14 other undergraduate students on an equity fund with more than $750,000 in assets under management. The students worked together to analyze different industries and companies, determine strategies, and recommendations to Crestlake senior management.

After graduation in 2003, Gus was hired for an entry-level trading role at boutique investment firm, Harper, Christensen & Schwartz. He was brought on to facilitate trades for the risk arbitrage desk and quickly became a valued and trusted team member. Initially, he merely executed the trades as provided but quickly became successful at devising option strategies for companies involved in takeover deals, making recommendations, and contributing to decisions that grew the company’s portfolio. He also gained an understanding of merger agreements and takeover laws and passed his FINRA series 57 exam.

He stayed with the company until 2006, when a friend at a larger player in the industry, 22nd Century Group, helped him secure a role as an investment analyst at the company. At 22nd Century, he developed trade opportunities in the healthcare market segment for the firm’s clients, traders and salesforce and was quickly promoted to research team leader.

In these early years, Gus embraced New York City life. He loved living in the bustling heart of one of the most diverse cities in the world. It represented a refreshing departure from what he saw as his staid and boring upbringing in a suburb of the nation’s capital. In his new career, he immersed himself in learning as much as he could about global markets both within and outside the communications sector. He was seen as a go-getter always willing to take on another project in a new area with a steep learning curve, whether it was updating and managing his team’s database of company analyses and financial projections, creating compelling, data-driven presentations for clients, or assisting with sell-side M&A transactions and financings – such as working with senior management to write sales memos, build out company projections, and contact potential acquirers.

During these years, he was also involved in many volunteer and philanthropic endeavors. He taught entrepreneurial business skills at Spectrum Youth Center and the Boys & Girls Clubs (tutoring teens as part of the Summer Brain Gain Program). He also started to get interested in global development organizations that were teaching business skills to people in developing nations.

By 2008, Gus was feeling a little restless in his role at 22nd Century. He longed to expand his knowledge and apply it to bigger, better, and more challenging leadership opportunities. Setting his sights on the Big 3, Gus applied and was accepted for the prestigious MBA program at the Wharton School.

Gus earned his MBA from Wharton in 2010 and – after an intensive 3-month internship at his “dream firm” Goldman Sachs & Co – he was offered a full-time position as an investment analyst in their Global Investment Research Division, joining a global team of 1,000+ professionals doing research for clients in the equity, fixed income, currency, and commodities markets.

Gus was excited to be a part of the company’s ongoing transformation after it had nearly dissolved during the 2008 financial crisis. He championed the company’s collaborative culture, readily sharing insights across teams, business sectors, geographic areas, and asset classes to improve the research process and provide a more multifaceted product to clients.

By October 2012, Gus had been promoted to an Analyst III position, analyzing, and maintaining economic data models for fixed income desks around the world (New York, London, Tokyo), generating current and prospective portfolios using internal and external models.

**He supplied the following information on his current resume about his accomplishments in this role and subsequent roles at Goldman Sachs:**

**Analyst III, Healthcare Assets, Global Investment Research**

**October 2012—February 2015**

* Evaluated and prepared $87 billion of potential client portfolios for portfolio managers.
* Used analytical problem-solving skills to streamline processes in collaboration with colleagues. Decreased manual updates to securities by 76% (reduced total of 6 hours of daily work by automating and decommissioning 73% of manual tasks).
* Served as lead analyst on 10 deals valued at $270 million.
* Constructed financial model with 8 scenarios and 15 variables resulting in $225,000+ in new revenue while automating a process that had been manual for more than 40 years.

**Research Associate, Healthcare Assets, Global Investment Research Division**

**February 2015 – August 2018**

Research and consulting focused on healthcare technologies and services for payers, health systems and medical groups. Provides transparency to every major healthcare technology and service decision by researching (~20K interviews annually) and reporting on the performance of such technology. Tasked to oversee and manage all research operations including outreach, scheduling, interviewing, data collection, research methodology, and project management. These operational are most important assets and capability facilitate $20M+ annually. Liaison and partner across business units for operating processes and business systems.

* Oversee 4 direct reports. Focus on creating new tools and processes for collecting research, achieving a 145% increase in output with 63% fewer resources. Personally completed 124 vendor executive team deep analysis sessions, while my team completed 636 total engagements.
* Delivered $2.9M in presentation content revenue than any other analyst over the last 5 years.
* Decreased time spent on analyst functions by 50% by creating a new roadmap and vision to develop analyst tools.
* Systematically increased company monthly research input by 20% resulting in 57% increased output, receiving the Goldman Sachs Team Recognition Award.
* Created the most comprehensive end of year market intelligence report compared to the prior three years

**Director of Investment Research, BBR partners, NYC, NY**

**August 2019 – Present**

(NOTE: Gus left Goldman Sachs in 2019 – through contacts from his charitable work, he was recruited to a leadership role with a midsized wealth management firm.

Oversee and manage a team of 9, sourcing new investments across all asset classes and performing ongoing due diligence on clients’ existing investments, as well as working with the Portfolio and Wealth Advisory team to analyze the risk and return characteristics of client portfolios. Serve on both BBR’s Investment Committee and Charitable Committee.  
- Implemented hiring framework resulting in an increase in hiring speed by 89%  
- Decreased onboarding time for new hires by 50% with increasing quality  
- Managed $3.5M P/L   
- Helped scale team from 3 to 11 employees  
- Collaborated with sales leadership to grow professional services adoption by 167% while increasing customer ROI  
- Accelerated certification program throughput by 54% while maintaining team's 100% pass rate  
- Ensured 100% on time delivery of 175 team projects annually.

Throughout his career with Goldman Sachs, Gus has continued his volunteer and charitable efforts, first joining the fundraising committee for the Boys Club of New York in 2012 and leading the effort to host the organization’s annual fall and spring celebrations from 2014 through 2016. In his 4 years of involvement, the events raised $6.2 million for the organization.

In 2017, Gus partnered with a professor at NYU to write and secure an $18,000 grant from the US Embassy in Rwanda to teach business and conflict resolution skills to 200 youth whose parents survived the 1994 genocide. Traveling to Rwanda with a team of business leaders and educators, he helped launch the initiative, working with 20+ local teachers to lead training and provide continuing support through nonprofit partners in Rwanda. He has also recently joined the board for the Esther Boucicault Stanislas Foundation and Belle Creole, two organizations that seek to provide micro loans, training, mentorship, and other services to help HIV-positive Haitians learn sustainable crafts and attain jobs.

Flash forward to 2022. Gus is now married with a 3-year-old daughter and a soon-to-be son on the way. When his wife’s job went fully remote at the start of the global pandemic in 2020, they started talking about leaving the city and going back to DC to be closer to grandparents, aunts, uncles, and cousins. With a son due in just a few months, they want to make their move now. At the same time, Gus is looking to make the jump into the nonprofit world, supporting economic development for underserved communities by leveraging his successful career in finance as well as his volunteer fundraising, grant writing, and program development/leadership experience.

<https://www.idealist.org/en/nonprofit-job/ddec367b94424c038a8bb412e739c4f7-director-of-development-halcyon-washington>

Cut and paste of job description at above link:

**DIRECTOR OF DEVELOPMENT, Halcyon**

Washington, DC

**About this organization:**

Halcyon is accelerating the impact-driven future of business. In the long run, impact-driven businesses will outperform their traditional counterparts. Impact-driven businesses represent a powerful opportunity to drive equity and inclusivity in the workplace and in society. Impact-driven business is the only viable future for capitalist society and represents the easiest path forward to solving the problems of the 21st century.

**Job Summary:**

Plan, organize, and direct Halcyon’s fundraising, including annual fund, foundation grants and support, individual giving, major gifts, corporate gifts, planned giving and special events. Persuasively communicate Halcyon’s mission and programs to potential funders. Work closely with the Halcyon team, diverse stakeholders and supporters, and a wide range of community institutions. Establish, nurture, and maintain relationships with foundation contacts necessary for the maintenance of trust and continued growth.

Develop a tactical plan for implementing the next 2-3 years of Halcyon’s growth. Manage staff and funds wisely to ensure effective and responsible implementation of the plan. Ensure organizational structures and processes are sound for continued great work beyond 3 years.

**Essential Responsibilities:**

Strategic Planning and Development

Develop, recommend, and implement fundraising strategies to achieve goals of $6 million+ annual budget and multi-year reserve campaign of $6-8 million.

Meet projected revenue goals through retention and renewal of existing supporters, as well as identification of new foundation, government, corporate and private philanthropic prospects.

Identify and support strategic and collaborative alliances with local, national, and international organizations (including community groups, museums, business and trade groups, cultural organizations, governmental agencies, and others) to further the Halcyon’s goals and expand the organization’s profile and reputation.

Management

* Serve as member of the senior management team.
* Develop annual revenue budgets in conjunction with the senior team and Board. Frequently monitor progress towards goals, directing fundraising activities to ensure success and advising appropriate management on performance, budget variances, and significant challenges.
* Recommend and implement technology, systems innovations, procedures, and fundraising best practices across multiple portfolio owners to achieve revenue goals, engagement targets, and other key metrics.
* Conceive and oversee major fundraising events, collaborating with the Events team, Board, and senior team.
* Attract, develop, and retain a competent, well-trained, properly structured, and highly motivated fundraising team. Establish performance standards and provide team with timely feedback.
* Stay abreast of developments in field and participate in relevant professional organizations and meetings to understand and, as appropriate, incorporate trends and new approaches.

Relationship Management

* Seek out, support, and contribute to collaborative relationships and partnerships with team members, fellows, advisors, consultants, stakeholders, congressional and diplomatic corps, and existing funders and audiences.
* Meet prospective donors and supporters on a continual basis to establish; nurture, cultivate and steward effective relationships.
* Serve as a Halcyon ambassador at internal and co-hosted events, as well as external events throughout the DMV region.

Position Requirements

* A minimum of five years of professional fundraising experience in a fast-paced non-profit environment
* Two years of supervisory/management experience with a team of two or more
* Bachelor’s degree required; Master’s degree preferred

Skills Required

Self-starting, entrepreneurial disposition

Enthusiasm for social entrepreneurship

Strong written and oral communication skills

Proven ability to foster inclusive environments in diverse communities

Emotional intelligence and interpersonal skills, including the ability to connect with people from a variety of lived experiences to engender trust

Attention to detail with reliable organizational skills to prevent details from slipping through the cracks

Polite persistence when following up with key stakeholders

Project management in a team environment to support one another in achieving objectives

Nimbleness to adapt to frequent changes in a fast-paced work environment

Proven ability to work collaboratively with others and independently to achieve common objectives, and a good sense of humor

Reliable work ethic to complete tasks

Time management expertise to prioritize work projects and meet multiple deadlines

Embody Halcyon’s core values of nimbleness, humility, risk-tolerance, nurturing, and optimism

Computer skills including Microsoft Office, Google Docs, PC, and Mac

To apply, send a cover letter, resume and salary requirement

TIME COMMITMENT

Full Time Schedule

APPLICATION DEADLINE

August 29, 2022

EDUCATION

4-Year Degree Required

EXPERIENCE LEVEL

Mid-level/Managerial

SALARY

USD $82,500 - USD $110,500 / year