

# Lily P. Wu

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## PROFESSIONAL EXPERIENCE

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### **ICV Partners**

*Private Equity Associate*

Miami, FL

Jul 2024 – Present

- Identifying, managing, and evaluating new investment opportunities alongside senior team members. Developing comprehensive financial models, including valuation and financial analysis. Preparation of investment materials for Investment Committee
- Providing strategic and operational support to portfolio companies, including initiatives aimed at revenue and EBITDA growth, financial reporting, and potential add-on acquisitions

### **Piper Sandler**

*Investment Banking Analyst, Diversified Industrial Services Group*

Minneapolis, MN

Dec 2022 – Jun 2024

- Analyzed and evaluated companies throughout the Industrials sector, including transportation & logistics, automotive aftermarket, and equipment manufacturing using various valuation techniques such as discounted cash flows, leveraged buyouts, comparable companies, and precedent transactions
- Created financial models to analyze the impact of mergers, acquisitions, and debt & equity capital markets transactions on earnings, cash flows, capitalization, creditworthiness, and ownership structure in support of management presentations

### Selected M&A Transaction Experience

- **Strategic Advisor for Private PEO Management & HR Outsourcing Firm (Ongoing)**
  - Worked closely with client's C-suite team and senior bankers to draft investor materials and assist in potential sizing and financing considerations for process
  - Supported the deal team in constructing an LBO model based on client's financial audits and growth estimates
  - Actively worked on creating a confidential information presentation, identifying the correct universe of potential investors, and preparing for outreach to market transaction
- **Strategic Advisor for Private Motor Oil & Automotive Fluids Manufacturer (Ongoing)**
  - Assembled a thorough and tailored list of information requests and related questions to initiate the due diligence process, while producing preliminary data cuts to help frame the client's positioning
  - Created detailed materials outlining industry and company-specific research, which assisted senior bankers' efforts to convey the client's competitive advantage and differentiated product offerings

### **Travelers Insurance**

*Fixed Income Analyst, Corporate & Municipal Bonds Group*

St Paul, MN

Jul 2022 – Nov 2022

- Gathered and distilled data from prospectuses, financial statements, third-party research, and periodicals to perform fundamental credit analysis on investment grade and high yield securities across corporate and municipal bonds; coverage included: retail & restaurants, healthcare, and insurance sectors
- Followed market conditions and regulatory changes, built out spreadsheets with updated financials, and utilized Bloomberg to inform investment rationale & recommendations, which were presented to senior management

### **Satori Capital**

*Summer Intern*

Dallas, TX

Jun 2021 – Jul 2021

- Shadowed the evaluation of financial returns for high-net-worth individuals, utilizing Monte Carlo optimization and a Python-powered excel file; completed monthly financial reports for individual clients, which disclosed profit / loss and other metrics
- Analyzed potential PE opportunities in the context of its respective sectors, market conditions, and Satori's principles & values

## EDUCATION

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### **University of Notre Dame**

*Bachelor of Business Administration*

South Bend, IN

May 2022

Majors: Business Analytics, Economics | Minors: Chinese, Theology

Cumulative GPA: 3.69/4.0 | SAT: 1480/1600 | Honors: Dean's List (Spring 2021)

## LEADERSHIP EXPERIENCE AND ACTIVITIES

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### **Python Fundamentals**

*Teaching Assistant*

South Bend, IN

Aug 2021 – May 2022

- Provided coding demonstrations and articulated Python concepts to facilitate the learning of 3 classes, while grading assignments & quizzes and acting as an intermediary between students and the professor

**Econometrics: The Developing World***Researcher*

South Bend, IN

*Aug 2021 – May 2022*

- Gathered raw data from online databases (WHO, World Bank, FRED, etc.) to find social & economic patterns within developing nations and marginalized populations
- Configured models utilizing regression discontinuity and difference in differences within Stata and R-programming

**ADDITIONAL INFORMATION**

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**Technical Skills:** Microsoft Office, Bloomberg, S&P Capital IQ, Series 79 Certified**Interests:** Chess, Classical Singing & Piano, Hiking, Following Tik-Tok Viral Cooking Recipes