

# Kevin Cunningham

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## SUMMARY

Highly organized and dedicated finance professional with a demonstrated ability to successfully multitask. Recognized as a self-starter and flexible team player who can work collaboratively and independently. Possesses a strategic focus and strong problem-solving skills, combined with expertise in analytical analysis.

## CORE STRENGTHS

Finance | Accounting | Analytical | Problem Solving | Strategic Focus | Leadership | Project Management

**Technical Skills:** MS Office: Word, Excel, PowerPoint, Bloomberg

**Certifications:** FINRA Series 63 and 79 Licenses

## EDUCATION

**Bachelor of Science (BS)**, Finance, University of St. Thomas | Saint Paul, MN | May 2022

- Magna Cum Laude | Aquinas Honors Program | 3.85 GPA
- Aristotle Fund | Student managed investment fund
- Member, Beta Gamma Sigma, The International Business Honors Society

### Athletics & Club Involvement:

- **Guard**, University of St. Thomas Basketball Team
  - 4 years
  - Academic All-Conference
  - National Association of Basketball Coaches Honors Court
- **Member**, Investment Club

## PROFESSIONAL EXPERIENCE

### Priority Sports & Entertainment

January 2025 - May 2025

#### Intern

Assist marketing and agent teams with player branding, recruitment, performance analysis and other special projects.

**Chartwell Financial Advisory, Inc.** | Chicago, IL

July 2022 – December 2024

**Investment Banking Senior Analyst**, July 2024 – December 2024

**Investment Banking Analyst**, October 2023 – June 2024

Experience working on a variety of sell-side deals, collaborating directly with associates, vice presidents, managing directors and clients' management teams.

- Contributing member on the deal team which helped Room & Board, a national furniture retailer, transition to an ESOP.
- Identify and research companies in the target markets with a history of acquisitions and aligning acquisition strategies client profiles.
- Assists clients in determining the optimal path of sale for the company and shareholders, considering options such as a sale to a financial/strategic buyer or transitioning to an ESOP.
- Support companies in executing dual-track processes for third-party M&A and ESOP transitions.
- Contributes to the development of marketing materials, including pitches, teasers, CIM's (Confidential Information Memorandums), and management presentations.
- Conducts due diligence to gain a comprehensive understanding of new clients' businesses.

**Valuation Analyst**, July 2022 – October 2023

Performed analysis related to valuations of privately held middle-market companies, with a focus on companies with employee stock ownership plans (ESOPs).

- Performed due diligence and analyzed public companies to support client valuations.
- Examined mergers and acquisition transactions to apply the comparable transaction approach when valuing companies.
- Studied economic and industry conditions to ensure comprehensive analysis and informed decision-making.
- Demonstrated expertise in writing in-depth and detailed reports on over 25 companies, specifically examining share price and providing valuable insights.