

# Josh D. Harlett

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## EDUCATION & HONORS

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

**Columbus, Ohio**

*Bachelor of Science in Business Administration*

*December 2022*

- **Specializations:** Finance and Accounting | **Major GPA:** 3.8 / 4.0
- **Fisher Futures Investment Banking Program:** 1 of 24 students in a highly competitive, faculty-selected program that educates students in investment banking, financial modeling, forecasting, and valuation

## WORK EXPERIENCE

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**Macquarie Group**

**Chicago, Illinois**

*Investment Banking Summer Analyst, Software and Services*

*June 2022-August 2022*

- Worked on 4 live deals and built PowerPoint decks for the quarterly update session as well as a new Transportation tech vertical; worked with clients to develop various presentations and buyer trackers
- Selected Transaction Experience
  - Canadian Education Company's ~\$100m Sale to an English Education Group
    - Supported company management throughout bid and diligence phases which resulted in a more efficient LOI to close process
  - Potential ESG Company's Initial Public Offering
    - Created valuation using public company comparables, precedent transactions, and DCF analysis; worked with the team to develop effective client discussion materials

**Copper Run Capital, LLC**

**Columbus, Ohio**

*Investment Banking Spring/Summer Analyst*

*January 2021-August 2021*

- Developed financial valuations for buy and sell-side engagements using comparable companies analysis, precedent transactions, and DCF models
- Identified potential targets and acquirers for buy and sell-side deals based on the fit for respective clients
- Created pitchbooks, marketing materials, and research reports to support the analysts and associates

**Northwestern Mutual**

**Columbus, Ohio**

*Financial Representative Intern*

*June 2020*

- Worked with clients to create personalized portfolio strategies using specific goals and risk tolerance for each client. Ended in 5-15% returns for each client in the first calendar year

## LEADERSHIP & INVOLVEMENT

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**Buckeye Capital Investors**

**Columbus, Ohio**

*Managing Director – Energy Sector*

*September 2021-Present*

- Using DCF, Comps, and Precedent Transaction Analysis to evaluate and pitch potential investments
- Organizing the SAM fund for the energy sector, allocating \$100,000, and doing in-depth industry research
- Led a team of 4 students to 1<sup>st</sup> place in the annual stock pitch competition. Created a pitch deck with financial valuations, industry, and company overview and then led the presentation to senior members

**The Ohio State University**

**Columbus, Ohio**

*Student Analyst I*

*March 2020-September 2020*

- Supported students with technology issues and adapting to online education via one-on-one Zoom meetings. Specialized in Finance, Economics, and Accounting concepts

**Investment Banking Program**

**Columbus, Ohio**

*Member*

*February 2020-November 2020*

- Participated in a strategic 15-week curriculum that covered the fundamentals of investment banking including the history of the industry, analyst responsibilities, and various valuation methodologies

## CERTIFICATIONS & INTERESTS

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- **Wall Street Prep Certification in Financial & Valuation Modeling**
- **Bloomberg Market Concepts Certification**
- **Interests:** Football, Classic Rock, Martial Arts, *Game of Thrones*, Strategy Games, Traveling, Skiing