

Jim Phan

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EDUCATION

University of South Florida (USF), Muma College of Business

Tampa, FL

B.S, Finance & B.S, Quantitative Economics and Econometrics

- **GPA:** 4.0/4.0, SAT: 1460
- **Honors:** 1st place – Junior Enterprise KPMG Case Competition, \$20,000 Green & Gold Academic Scholarship, Dean's List
- **Programs:** Goldman Sachs Emerging Leaders Series (Sales and Trading), Nomura Expanding Opportunities Summit Series, Fannie Mae Next Up Program, JP Morgan Career.edYOU Academy, SEO Alpha Academy, Wall Street Bound, McKinsey FORWARD.

EXPERIENCE

Bain & Company

Boston, MA

Workday System Analyst Intern

July 2024 – Present

- Processed 300+ Workday helpdesk tickets and feature requests from internal stakeholders by identifying risks and developing solutions to help maintain system stability and improve workflow efficiency.
- Revamped and improved 250 pages of internal Workday onboarding guidelines to assist new hires with recommendations being rolled out globally using Bain Toolbox, an internal tool developed by Bain to increase efficiency in making PowerPoint decks.
- Tested and released new Human Capital Management, Report, EIB, and Time & Absence features to enhance systems and processes.
- Developed a vendor management & optimization platform with 2 Technology interns and an Associate Consultant in Hackathon 2024, a competition for Bain employees worldwide to ideate and pitch B2B solutions leveraging AI and other technologies.
- Participated in employee training sessions on tools (PowerPoint, Excel, Tableau, Alteryx) and skills (Agile, Answer First, 80/20).

Investment Club at USF

Tampa, FL

Consumer Sector Equity Research Associate

May 2024 – Present

- Collaborate with 2 Global Investment Research members to provide equity research reports with a hold period of 12 – 18 months.
 - September 2024: Hold recommendation for Lululemon Athletica Inc. (LULU) based on the solid financial position with \$1.6 billion in cash and a -14% in inventory, combined with EPS +18% and the firm's repurchase of \$1.2B in stock YTD.
- Participated in 150+ hours of intensive training in analyzing financial statements, researching industries, and building 3-statement models while using DCF, multiples, and precedent transactions to evaluate companies.
- Chosen as 1 of 11 top-performing students to join the highly selective Finance Career Compass program to receive direct mentorship from finance professionals at top firms, including KeyBanc Capital Markets (New York) and Capital Group (Los Angeles).

HEXA Consulting Junior Enterprise

Tampa, FL

Vice President

April 2024 – Present

- Manage a team of 30 USF students, allocating resources to 10+ local clients to consult on business development and operation plans.
- Forecasted and analyzed funding plan with the Finance Director and President of HEXA to organize 10 events for USF students.
- Organized 10+ public events, including case study review sessions and experience workshops from top consulting firm professionals.
- Published management consulting guides on crucial interview topics, including brain teasers, market scale, and behavioral preparation.

Project Manager

October 2023 – May 2024

- Managed 7 consultants to craft financial statement templates, market expansion plans, and branding kits for 2 companies in Tampa.
 - An example includes a Chinese restaurant that is also a coffee shop, whereby we analyzed the company using a SWOT framework and developed a 6-month marketing campaign, alongside a 20-page pitch designed to distribute the work among 10 employees.
- Developed dynamic dashboards using Tableau and Power BI to visualize financial reports and marketing strategies.

Jade Bridge Capital

Remote

Co-Founder, Equity Research Associate

April 2024 – Present

- Wrote 2 equity research papers recommending buying Penn Entertainment and VFC Corporation using the SOTP valuation method.
 - July 2024: Buy recommendation for V.F. Corporation (VFC) based on its \$1.5B cash deal to sell Supreme, which is expected to enhance balance sheet flexibility and normalize its debt levels. It implies a 12.9x LTM EV/EBIT and a 2.8x LTM EV/Sales.
- Proposed a branding kit and created Slide Master templates in PowerPoint for reports and weekly quick recap posts on LinkedIn.
- Conducted weekly research on global market news; topics included world investing trends, emerging markets, and rising stocks.

Little Stars Science Club

Hybrid

Co-Founder, Finance Analyst, Program Associate

June 2015 – August 2023

- Organized 100+ for-profit programs to expand experimental STEM education to 2,000+ children between 6 to 15 years old.
- Distributed \$10,000 to conduct non-profit STEM events for children in rural areas and supply students with necessities.

SKILLS, ACTIVITIES & INTERESTS

Certifications: CAIA Fundamentals of Alternative Investments Certificate, Microsoft Office Specialist Master 2019 (Word & Excel Expert, PowerPoint), Fundamental of Data Analysis in Excel, Power Query Fundamentals (CFI)

Technical Skills: Excel, PowerPoint, Power BI, Tableau, Alteryx, Financial Modeling, Capital IQ, ServiceNow, Workday, Jira

Interests: Wall Street Journal, Trading, Created a 10-episode podcast, Flag Football, Running, Ping-Pong, Lionel Messi, Hackathon