

PHILIPPE KRIZ

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EDUCATION

University of Florida, May 2009 **Gainesville, FL**
Master of Science in Finance, Combined Degree
Bachelor of Science in Finance, Double Minor in Entrepreneurship and Leadership
Major GPA: 3.8 / 4.0, Overall GPA: 3.76/4.0
Tsinghua University, Chinese Language Program, Fall 2007 **Beijing, China**
Awarded Dean's List every semester
Financed 100% of education from scholarships.

EXPERIENCE

Lehman Brothers, May 2008 - Present **New York, NY**
START Analyst, Latin American Equities Trading

- Supported cash trader by "Fixing" and sending Indications of Interests of Buy/Sell orders through Galaxy and Bloomberg
- Drafted daily market summary synthesizing relevant information that could have a potential effect on intraday trading dynamics
- Composed executive summary of OGX Petroleo e Gas Participoes SA preliminary offering, outlining key offering terms, financials and investment thesis
- Prepared presentation materials for European Sales Team outlining IPO Listing of the NYSE versus the LSE

Guggenheim Partners, Summer 2007 **Miami, FL**
Analyst, Private Wealth Management

- Conducted a manager screening for various Asset Types including US, Europe, Japan and Emerging Markets, and limited database from over 10,000 funds to approximately 50. Contacted managers and conducted initial Request-For-Information (RFI) due diligence questionnaires
- Worked with Investment Committee to draft investment strategy pieces, which included economic commentary and capital market forecasts, as well as to derive return, volatility and correlation assumptions for statistical models
- Assisted client relationship managers in drafting client-specific presentations on various subjects such as portfolio performance, return attribution, fund analyses, etc.

Guggenheim Partners, Summer 2006 **Miami, FL**
Junior Analyst, Private Wealth Management

- Worked with portfolio managers to draft Quarterly and Monthly reports for International Wealth Management clients in English and Spanish, as well as to establish pending transactions for portfolio rebalancing
- Utilized Pertrac fund analysis software to create customized long-only and hedge fund portfolios based on various statistical metrics including Sharpe Ratios, scenario analyses, benchmark comparison, etc.
- Analyzed various investment proposals across asset classes based on suitability for existing clients

ACTIVITIES

Florida Leadership Academy, August 2006 – May 2007 **Gainesville, FL**
Member

- Florida Leadership Academy is a program for the Top-100 business students that focus on leadership development and community service. Participated in bi-weekly meetings where case studies were conducted with the purpose of enhancing ethical decision making, communication and negotiation

Hispanic Student Business Association, August 2005 – May 2007 **Gainesville, FL**
President of Corporate Relations

- Contacted companies such as Progressive Auto Insurance and Pepsi Bottling Group in order to sponsor the club
- Responsible for getting speakers to present to the club about their business and career opportunities in their field
- Responsible for recruiting new members to the club. Promoted the organization via business professors, flyers and personal contacts. Expanded from 10 members to currently 40

Israel Awareness Week, February 2006 **Gainesville, FL**
Organized Israel Rally

- Part of group in charge of organizing the yearly on-campus event for 400 students and bringing UF President Bernard Machen, College Democrats, and College Republicans as guest speakers
- Responsible for a budget of \$7,000 in event finances

SKILLS

Software: Bloomberg, PerTrac Investment Analysis Software, Advent Axys Portfolio Accounting, Morningstar Encorr Asset Allocation, Proficient in Microsoft Office.
Languages: Spanish (fluent), Hebrew (reading, writing fluency), Portuguese (fluent), Mandarin (basic)