**James**

Grey

**Investment Banker**

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# Executive Summary

* I am a top-performing, commercially astute and multilingual Investment Banker with impeccable research, quantitative and analytical capabilities.
* I have exceptional communication, networking and relationship management skills adapted from my confident, engaging and outgoing personality.
* Demonstrating a strong client orientation with the resilience and tenacity to exceed demanding business objectives and performance targets. <https://www.cvtemplatemaster.com>
* I am fluent in Spanish, German, English and Italian.

# Career Summary

## **Trainee | Associate | Investment Banker**

### Lazard | October 2009-Present

I originally joined Lazard on their graduate training programme which was an intensive three-year programme before progressing to associate level and I have since then quickly progressed through the ranks and became a fully fledged Investment Banker. During this time I have specialised in acquisitions, bonds and shares, lending, mergers and privatisations. I provide my specialist expertise in relation to buying and selling securities, bond and equity financing and profit forecasting and risk analysis.

### Key Achievements

* Instrumental in managing a range of financial services to a number of leading institutions and government bodies and providing direct insight into corporate, strategic and financial opportunities.
* Cultivated strong working partnerships with lawyers, accountants and financial officers and taking full ownership for maintaining my knowledge of financial and legal regulations.
* Utilised personal understanding and experience of investment banking products including M&A, capital markets and financing.

## **Investment Banking Analyst**

### JP Morgan Chase | June-September 2009

I secured a 9-week programme that covered accounting fundamentals, financial modelling, valuation and Excel. I also got to try my hand at developing my core investment banking skills to help me to develop my client acquisition skills and I was fortunate to be involved in deals and transactions and engage with clients and international teams. <https://www.cvtemplatemaster.com>

### Key Achievements

* Undertook detailed financial modelling and presented a range of solutions to clients and received highly positive client feedback for conduct and professional approach.
* Devised presentation materials for use in client meetings, which included strategic alternatives, capital markets activity and general corporate finance.
* Supported with all stages of transaction executions, from the pitch phase through to closure.

## **Investment Banking Analyst**

### Goldman Sachs **|** June-September 2008

I completed a week internship as part of the Bank’s summer internship programme. I covered a number of business areas including Consumer and Investment Management, Corporate and Workplace Solutions and Global Compliance. <https://www.cvtemplatemaster.com>

### Key Achievements

* Astutely identified a range of market development and emerging developments that were proposed to clients which enabled several clients to achieve significant returns on their investments.
* Conducted sector and company research, advanced specialised sector themes; performed quantitative analysis, financial modelling, credit and valuation analysis and prepared for a range of client presentations.

James is a first-rate investment banker. I have worked with him on several transactions over the last few years, where he has demonstrated well-honed deal execution skills, gained from many years of experience. He is a strong team player and a great relationship person. He is ambitious, driven and very highly regarded. A quality guy.

**Noel Greenson, Founder at Beta Advisory Partners**

# Education

### **MBA**

##### University of Oxford, Said Business Studies (Presently Undertaking)

### **BA Economics and Management (1st Class hons)**

##### University of Oxford, Said Business School (2006-2009)

* Received full scholarship to attend the prestigious University of Oxford in recognition of my impressive sporting achievements, including representing my school at county level in rowing, cricket and rugby
* I achieved the highly coveted position of Head of Sports Societies within the Student Union whilst at University
* Received University Dean Award for impressive academic performance throughout my degree

### **A Level English (A), Economics (A\*), Mathematics (A\*) and Business (A\*)**

##### Southampton Grammar School (2002-2006)

### **12 GCSEs A\*-B Including English and Mathematics**

##### Southampton Grammar School (2002-2004)

# Affiliations

* The Chartered Institute for Securities & Investments (CISI)
* Institute of Chartered Accounts in England and Wales (ICAEW)

# Hobbies & Interests

* I enjoy competitive sports and I am an accomplished sportsman; having competed whilst at School at county level for Cricket, Rugby and Rowing which enabled me to secure a scholarship whilst at University. I rowed for my college whilst at University and I continued this passion ever since when time allows outside of my demanding job.
* I enjoy international travel and enjoy the benefit of being raised in a multilingual family; my mother is Spanish and Father Italian so I have spent much of time residing in these countries during the holidays. I am fluent in Spanish, German, English and Italian.

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