

Henry Yu

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EDUCATION

Queen's University

Bachelor of Commerce

Kingston, Ontario

2017 – Present

- **Academics:** Cumulative GPA of 4.03/4.30 (A+ in Finance, Financial Accounting, Management Accounting, and Managerial Statistics)
- **Awards:** Dean's List with Distinction (top 10% academic ranking) in 2018 and 2019; Professor C.E. Law Commerce Scholarship
- **Exchange:** Completed a semester abroad at the Audencia Nantes School of Management during the winter of 2020

Hugh McRoberts Secondary

B.C. Provincial Secondary School Diploma

Richmond, British Columbia

2013 – 2017

- **Awards:** Presented with the Principal's Honor Roll Award (2013 – 2017) for receiving A's in all courses

PROFESSIONAL EXPERIENCE

Morgan Stanley

Investment Banking Summer Analyst

Toronto, Ontario

Summer 2020

- Completed an internship in the Investment Banking Division at Morgan Stanley as a generalist
- Performed a mock transaction analysis for a large U.S. luxury goods company that was presented to Managing Directors at the firm; prepared valuation materials including comparable companies, precedent transactions, discounted cash flow, and accretion/dilution analyses

Ontario Teachers' Pension Plan

Private Equity Summer Analyst

Toronto, Ontario

Summer 2019

- Completed a 17-week internship within the Technology, Media & Telecom private equity group of Canada's largest single-profession pension plan with \$204.7B in net assets
- Worked directly with principals and associates to analyse private equity opportunities by researching industry cyclicality, reviewing confidential information memorandums, and conducting expert-calls
- Conducted supporting analyses through several valuation methods including leveraged buyout models, discounted cash flow, precedent transactions, and comparable company analyses to evaluate and execute two target bids valued at over \$750M

Turtle Holdings

Private Equity Summer Analyst

Toronto, Ontario

Summer 2018

- Completed a 12-week internship at Turtle Holdings, a family investment office focused on lower to middle market private equity buyouts
- Screened over 250 companies per week by using business directories to look for potential targets and generate leads for the team to evaluate
- Independently assessed 30 businesses and industries by modeling recurring revenue, company and industry cyclicality, and performing financial statement analyses
- Developed and presented comprehensive investment recommendations on 12 niche industries to a partner that resulted in the signing of two expressions of interest

EXTRACURRICULAR ACTIVITIES

Queen's University Investment Counsel (QUIC)

Chief Executive Officer

Kingston, Ontario

2020 – Present

- Selected as one of three executive members for the 2020-2021 fiscal year to lead a team of 35 students managing a ~\$1.8M portfolio of Canadian and U.S. equities on behalf of the Queen's University Endowment and Mackenzie Investments
- Responsibilities include reporting to the QUIC Board of Directors, liaising with alumni and the broader university community, educating junior members on the counsel, and analysing investment ideas brought forward by sector teams

Portfolio Manager (Financial Institutions Group)

2018 – 2020

- Prepared investment memorandums and holding analyses on ten portfolio companies within QUIC's Financial Institutions Group
- Selected securities by performing various valuation methods and evaluating economic moats, market irrationality, and management incentives

Queen's Finance Association Conference (QFAC)

NYC Stock Pitch and Case Director

Kingston, Ontario

2017 – Present

- Assisted in the development and operations of Canada's leading undergraduate finance conference, which comprised over 90 delegates
- Currently directing logistics and marketing of a financial case competition in addition to acting as the main point of contact for the annual New York City stock pitch competition sponsored by Capricorn Investment Group
- Previously served as a Sponsorship Director (2019) and worked with a team of seven to secure a sponsorship budget of ~\$80,000 from over 30 distinguished financial institutions

ADDITIONAL INFORMATION

- **Languages:** Fluent in English, French, and Mandarin
- **Arts:** Achieved The Royal Conservatory of Music level nine in piano and awarded with second place at the Richmond Carving Show
- **Sports:** Placed third at the Volleyball BC Provincial Championships, consisting of the province's 16 top ranked teams