

# Jamie Bennett

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## EDUCATION

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### Queen's University

*Bachelor of Commerce*

Kingston, Ontario

2018 – Present

- **Academics:** Cumulative GPA of 3.94/4.30; Queen's Excellence Scholarship; D.I. McLeod Dean's List
- **Relevant Courses:** Finance II (A+), Managerial Accounting (A+), Mathematical Analysis for Management (A+)

### Highland Secondary

*Dogwood (High School) Diploma*

Comox, British Columbia

2014 – 2018

- Gold Honor Roll; Awarded as top-10 student in class from 2015-2018; 94% graduating average

## PROFESSIONAL EXPERIENCE

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### Houlihan Lokey

*Investment Banking Summer Analyst*

Los Angeles, California

Summer 2021

- Scheduled to complete an internship in the Financial Restructuring Group

### Ontario Teachers' Pension Plan (OTPP)

*Private Equity Summer Analyst*

Toronto, Ontario

Summer 2020

- Completed a 17-week internship within the Private Capital, Direct Investing team of Canada's largest single-profession pension plan
- Built six presentations highlighting key trends, investment merits, COVID-19 impact, and valuation analysis for consumer subsectors
- Conducted supporting valuation analyses for the recapitalization of two portfolio companies; participated in management and lender calls
- Worked directly with directors, principals, and associates to analyze private equity opportunities through researching industry cyclicality, reviewing confidential information memorandums, and conducting expert and management calls; conducted supporting LBO analysis for target control bid

### Georgian Partners

*Growth Equity Summer Analyst*

Toronto, Ontario

Summer 2019

- Completed a 14-week internship as the inaugural formal intern on the investment team of Georgian Partners, a ~\$2.5B growth equity fund
- Built SaaS metrics, comparable company and precedent transaction analyses, as well as operating models for five transactions
- Performed and led in-depth market research and expert calls for the industrial cybersecurity, conversational chatbot, and fintech markets
- Assisted in creation of synergy models and research reports to evaluate strategic M&A opportunities for two portfolio companies
- Select Transaction Experience:
  - \$45M Series-B funding round for Shipwell (logistics technology company)
  - Built comparable company, precedent transaction, and customer cohort analysis; assisted with pre- and post-close due diligence

## EXTRACURRICULAR ACTIVITIES

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### Queen's University Investment Counsel (QUIC)

*Portfolio Manager (Energy & Utilities)*

Kingston, Ontario

2018 – Present

- Work with a team of 35 students to manage a \$1.8M portfolio of Canadian and U.S. equities on behalf of the Queen's University Endowment Fund and Mackenzie Investments
- Prepare investment memorandums regarding portfolio performance and industry trends for the Energy & Utilities team to be presented at public QUIC meetings on a tri-weekly basis
- Acted as a mock M&A advisor to Pinnacle Foods on their acquisition by Conagra Brands at the 2019 QUIC Deal Competition; presented a full transaction analysis to a panel of institutional investors
- Previous roles include Analyst (Energy & Utilities) and Junior Analyst (Generalist)

### Queen's Private Capital Group

*Project Manager*

Kingston, Ontario

2019 – Present

- Work with a team of 30 Queen's students to provide pro-bono advisory services to private equity and venture capital firms; conduct market research, perform financial analysis and search mandates to identify investment opportunities
- Completed 2 advisory projects for Peloton Capital Management developing full market analysis; currently working with Dream Unlimited
- Authored deep-dives on distressed energy investing in Canada and opportunistic technology investing through COVID-19

## ADDITIONAL INFORMATION

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- **Additional Involvement:** Queen's Finance Association Conference (Education Coordinator), Queen's Investment Banking Preparatory Course
- **Conferences & Competitions:** Burgundy Asset Management Stock Pitch Competition, Capitalize for Kids (C4K) Student Investing Challenge, Fidelity Investments "A Class by Themselves" Event, and Investors of Tomorrow Stock Pitch Competition (Finalist)
- **Sports:** Former varsity basketball athlete; current intramural basketball and club soccer athlete; avid skier, surfer and hiker
- **Entrepreneurship:** Created an online business through researching specialty items generating over \$10,000 in revenue with a ROI of 41%
- **Community Outreach:** Volunteer at The Views Residential Care (200+ hours), Comox Valley Soup Kitchen and Pedalheads Bicycle Camp
- **Interests:** Professional and NCAA football and basketball, strategy board games, vinyl collecting, architecture, 20<sup>th</sup> century art, fishing