

Matt Halpen

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EDUCATION

Queen's University

Bachelor of Commerce

Kingston, Ontario

2018 – Present

- **Academics:** Cumulative GPA of 4.14/4.30; D.I. McLeod Dean's List with Distinction (top 10% of class), Principal's Scholarship (\$6,000)
- **Relevant Courses:** Business Decision Models (A+), Calculus for Business (A+), Finance II (A+), Financial Accounting (A+)

Bishop Carroll High School

Alberta High School Diploma

Calgary, Alberta

2015 – 2018

- **Awards:** CSHSAA Swimming (3-time Gold Medalist), Rutherford Scholarship (\$2,500), Honors with Distinction
- **Exchange:** Completed cultural exchange to Yamate Gakuin High School in Yokohama, Japan during summer 2017

PROFESSIONAL EXPERIENCE

Evercore

Incoming Summer Investment Banking Analyst

Houston, Texas

Summer 2021

- Scheduled to complete a 10-week internship at Evercore in their Energy Investment Banking Division

Generation Capital

Summer Investment Analyst

Toronto, Ontario

Summer 2020

- Completed a 16-week virtual internship at Generation Capital, a privately held family office offering a variety of financial management and investment services to clients, including private equity and venture capital
- Analyzed investment opportunities across the fixed income, real estate, eSports, and enterprise technology spaces
- Presented to senior leadership on the drivers and impact to investments of the incoming global unfunded pension obligations crisis

Waterous Energy Fund

Summer Analyst

Calgary, Alberta

Summer 2019

- Calgary private equity firm founded by Adam Waterous, former global head of investment banking for Scotia Waterous; focused on E&P transactions at the \$300M - \$500M level with ~\$1.4 billion raised in first fund
- Modeled and analyzed precedent Canadian take-private transactions in order to evaluate potential LBO deals for the firm
- Joined weekly operational data meetings with executives of portfolio companies, Strath Resources and Cona Resources

EXTRACURRICULAR ACTIVITIES

Queen's University Investment Counsel (QUIC)

Senior Portfolio Manager (Energy & Utilities)

Kingston, Ontario

2020 – Present

- Work with a team of 35 students to manage a \$2.0M portfolio of Canadian and U.S. equities on behalf of the Queen's University Endowment Fund and Mackenzie Investments
- Prepare investment memorandums, stock pitches, and holding analysis for the Energy & Utilities portfolio to present at QUIC public meetings
- Completed a 16-week summer analyst training program with deliverables due bi-weekly; topics focused on independent investment ideas, market irrationality, economic moats and management incentives
- Placed first in QUIC's annual Deal Competition, where a team of mock advisors present a detailed M&A analysis on a recent transaction

Queen's University Swim Club

Varsity Captain

Kingston, Ontario

2018 – Present

- Selected to lead team as captain for the 2021 and 2022 seasons; responsible for recruiting efforts, athlete support and team operations
- Train seven times per week during academic year (14 hours/week) and represent Queen's at collegiate swim meets across Ontario
- Achieved four bronze medal finishes at Divisional Championships in 50-, 100- and 200-meter breaststroke
- Reached the Ontario USPORTS 2020 A final in the 50- and 100-meter breaststroke; 29.35 and 1:03.50 respectively; finished as the highest scoring Queen's athlete out of 32 participants
- Two-time Alberta champion in 50- and 200-meter breaststroke; finalist at Junior Nationals; Olympic Trials competitor

Queen's Private Capital Group (QPCG)

Project Manager

Kingston, Ontario

2020 – 2021

- Collaborated with a team of over 30 Queen's students to provide pro-bono consulting services to private equity and venture capital firms; provided market research, financial analysis and search mandates to identify investment opportunities
- Developed an in-depth analysis of a new sub-sector for Dream, a Canadian real estate investment firm with over \$8 billion in AUM

ADDITIONAL INFORMATION

- **Language:** Japanese (Level N5 of the Japanese Language Proficiency Test; 3 years of language education)
- **Activities:** Students for Canada, Relay for Life Team Member (2019), Queen's Finance Association Conference (2019)
- **Skills:** Working knowledge of Microsoft Office Suite including Excel and PowerPoint; proficient on S&P Capital IQ
- **Diversity:** Métis Canadian; member of the Painted Feather Woodland Métis Tribe