

# 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 4.03/4.30; Queen's Excellence Scholarship; D.I. McLeod Dean's List
- **Relevant Courses:** Corporate Financial Planning (A), Derivative Securities (A+), Financial Statement Analysis (A+), Financial Strategy (A+)

## 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, the largest worldwide financial restructuring investment banking practice which has advised on more than 1,000 restructuring transactions with over \$2.5 trillion in aggregate debt claims

### 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; assisted with LBO analysis for control acquisition

### 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, a ~\$3.5B 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)

*Chief Executive Officer*

Kingston, Ontario

2021 – Present

- Selected as one of three executive members for the 2021-2022 fiscal year to lead a team of 35 students managing a \$1.9M 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 (Energy & Utilities)*

2018 – 2021

- Prepared investment memorandums and holding analyses on eight portfolio companies within QUIC's Energy & Utilities Group
- Selected securities by performing various valuation methods and evaluating economic moats, market irrationality, and management
- Previously Analyst, Energy & Utilities (2019-2020) and Junior Analyst (2018-2019)

### 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 5 advisory projects for CPP Investments, Peloton Capital Management, and Dream Unlimited; researched unit economics, roll-up opportunities, potential investment targets, and provided precedent transaction and comparable company analysis for various industries
- Authored deep-dives on distressed energy investing, take-private transactions, and opportunistic technology investing through COVID-19

## ADDITIONAL INFORMATION

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- **Additional Involvement:** Queen's Finance Association Conference (Education Coordinator), Canadian Restructuring Student Association
- **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
- **Sports:** Former varsity basketball athlete; current intramural basketball and club soccer athlete; avid skier 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, 20<sup>th</sup> century art, fishing