



Herbert D. Weitzman
Institute for Real Estate

RESUME
BOOK

Winter 2023/2024

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ADD A CONCENTRATION IN REAL ESTATE TO YOUR FINANCE, BUSINESS OR GLOBAL BUSINESS DEGREE

CONCENTRATION COURSES

UNDERGRADUATE

- REAL/FIN 3305 **Real Estate Principles**
- REAL/FIN 3358 **Real Estate Markets and Investments***
- REAL/FIN 3365 **Real Estate Finance and Advanced Principles**
- REAL/FIN 4321 **Real Estate Law and Contracts**
- REAL/FIN 4328 **Real Estate Valuation**
- REAL/FIN/RMIS 4332 **Commercial Property Risk Management and Insurance***

Course descriptions:



*Students who entered UTD under Fall 2023 catalog are required to take these additional courses to earn a concentration in Real Estate Investment Management.

The Jindal School of Management at UT Dallas has developed an innovative real estate program at both the undergraduate and graduate levels to prepare the next generation of leaders to meet the unique demands of the commercial and residential industries. The UTD Real Estate Investment Management program curriculum prepares students to enter the real estate industry by teaching the fundamentals of real estate and leading industry technology applications such as ARGUS and CoStar to perform financial and market analysis to analyze investments.

The Real Estate Investment Management program provides students a rewarding educational experience using innovative approaches for teaching today's adult learners the critical skills to become productive real estate professionals. Adding the Real Estate Investment Management Concentration to your UT Dallas degree prepares you to make your mark in the commercial and residential real estate industries. Here are just some of the positions graduating students have accepted on both the debt and equity side across the various asset classes to include office, industrial, retail, multifamily, hotel, and more:



- Financial Analyst
- Market Analyst
- Loan Portfolio Analyst
- Acquisitions Analyst
- Asset Management Analyst
- Credit Analyst
- Investment Sales Analyst
- Leasing Agent
- Investment Sales Broker
- Tenant Representative Broker
- Research Associate
- Mortgage Broker
- Banking Relationship Manager
- Property Accountant
- Loan Processor
- Lease Administration
- Appraisal
- Property Mangement



THE REAL ESTATE CLUB AT UTD

Real estate is a relationship driven industry. Both undergraduate and graduate students interested in careers in real estate are encouraged to participate in the Real Estate Club at the UT Dallas Herbert D. Weitzman Institute for Real Estate. Through this organization, students meet leading industry professionals and learn best practices through events, participation in case competitions, attending industry conferences, networking with alumni, faculty and other students passionate about real estate. The Real Estate Club at UTD and JSOM Career Management Center have deep employer relationships and present students with opportunities for internships and permanent employment to students.



POSSIBLE EMPLOYMENT

Weitzman Group	Ebby Halliday	NAI Robert Lynn
Bank of America	Edge Realty Partners	Prudential Real Estate Investment Group
Bank Ozark	Goldman Sachs	7-11 Corporation
BBG Advisors	Granite Properties	Stone Capital
Billingsley Company	Greystar	Transwestern
Brand Realty Partners	JP Morgan Chase	USAA Real Estate
Cushman & Wakefield	Jones Lang LaSalle	

REAL ESTATE INDUSTRY ASSOCIATIONS

UT Dallas Herbert D. Weitzman Institute for Real Estate serves as a platform for pursuit of many of the designations within the real estate industry, including the CCIM designation (Certified Commercial Investment Member). For more than 50 years, the CCIM designation remains the gold standard for commercial real estate professionals, including appraisers, asset managers, brokers, developers, investors, lenders, and other allied professionals. CCIMs complete a rigorous program of advanced coursework and training in financial and market analysis and demonstrate extensive experience in the commercial real estate industry. With a UTD Real Estate Investment Management Concentration students are well on their way to meeting the educational requirements to sit for the examination for the CCIM designation.

Other industry associations programs, events, designation, conferences and competitions include:

- IREM (Institute for Real Estate Management)
- CREW (Commercial Real Estate Women)
- ULI (Urban Land Institute)
- NAIOP (National Association of Industrial and Office Properties)
- CoreNet Global
- BOMA (Building Owners Management Association)
- NTCAR (North Texas Commercial Association of Realtors)

TO LEARN MORE ABOUT A CONCENTRATION IN REAL ESTATE CONTACT:

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 972.883.4721

DANIEL LOWRANCE, PHD
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THE UNIVERSITY OF TEXAS AT DALLAS
 Naveen Jindal School of Management
 Herbert D. Weitzman Institute for Real Estate

Add a Concentration in Real Estate to your Graduate MBA, Management Science or Finance Degree

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 Market Analyst
 Loan Portfolio Analyst
 Acquisitions Analyst
 Asset Management Analyst
 Credit Analyst
 Investment Sales Analyst
 Leasing Agent
 Investment Sales Broker

Tenant Representative Broker
 Research Associate
 Mortgage Broker
 Banking Relationship Manager
 Property Accountant
 Loan Processor
 Lease Administration Appraisal
 Property Management

CONCENTRATION COURSES

GRADUATE

- REAL/FIN 6321 Introduction to Real Estate
- REAL/FIN 6322 Real Estate Finance and Investment
- REAL/FIN 6323 Real Estate Market Analysis & Investments
- REAL/FIN 6326 Real Estate Law and Contracts

Course descriptions:





THE REAL ESTATE CLUB AT UTD

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- CoreNet Global
- BOMA (Building Owners Management Association)
- NTCAR (North Texas Commercial Association of Realtors)

Possible Employment

Weitzman Group
Bank of America
Bank Ozark
BBG Advisors
Billingsley Company
Brand Realty Partners
Cushman & Wakefield

Ebby Halliday
Edge Realty Partners
Goldman Sachs
Granite Properties
Greystar
JP Morgan Chase
Jones Lang LaSalle

NAI Robert Lynn
Prudential Real Estate Investment Group
7-11 Corporation
Stone Capital
Transwestern
USAA Real Estate

TO LEARN MORE ABOUT A CONCENTRATION IN REAL ESTATE CONTACT:

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DANIEL LOWRANCE, PHD
Associate Director of the
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WEITZMAN INSTITUTE FOR REAL ESTATE PROGRAMS REPORT

Fall 2023



UTD THE UNIVERSITY OF TEXAS AT DALLAS
Naveen Jindal School of Management
Herbert D. Weitzman Institute for Real Estate

REAL ESTATE CLUB
AT UTD

in

Herbert D. Weitzman Institute for Real Estate, UT Dallas

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NEWS FLASH

All graduate
Real Estate courses
will be offered
on-line beginning Spring 2024



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December 7, 2023

UTD Finance Award Graduation Celebration

MS Finance graduate student Sai Sunkara was awarded the Student Leader Certificate. Sai served the UTD Real Estate Club at UTD as a Board member since spring 2023. He maintained the club's website.



(Above - left to right) Sai Sunkara and Julie Lynch – Director of the Weitzman Institute for Real Estate



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Real Estate Club at UTD

Weitzman Institute for Real Estate

Club board members welcome new students!

Sai Teja Sunkara
Board Member



Real Estate Club at UTD officers attended UTD's Student Organizations Fair at Student Orientations on June 13, July 14 and August 16 to recruit new students.



(Above - left to right)
Matthew Miller Vice President and James Hunsinger President



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REAL ESTATE CLUB AT UTD BOARD MEMBERS INTERN AT WEITZMAN

WELCOME TO
weitzman[®]

	<p>Alex Hannie</p> <p>Market Research Intern Brokerage</p> <hr/> <p>Dallas</p>
	<p>James Hunsinger</p> <p>Market Research Intern Brokerage</p> <hr/> <p>Dallas</p>
	<p>Manuel Del Castillo</p> <p>Market Research Intern Brokerage</p> <hr/> <p>Dallas</p>
	<p>Katrina Kieu</p> <p>Market Research Intern Brokerage</p> <hr/> <p>Dallas</p>

Real Estate Club at UTD Board members were hired as Interns to perform market research for the Weitzman Retail Annual Forecast Report.

Weitzman provided training and support to help ensure the success of these internships.



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August 29, 2023 “Welcome Back” Real Estate Club at UTD Event

The Real Estate Club at UTD Board shared with over 120 students the mission of the club and benefits they have derived from being a club member which included learning more about the industry, meeting and starting to build their network of industry professionals, forging peer-to-peer relationships, scholarship opportunities and more. The Board also revealed the fall 2023 events and activities they developed as a result of their three strategic planning meetings from the summer.



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September 7, 2023

CRE Young Professional Panel

The CRE Young Professionals Panel presented a unique and invaluable opportunity for students to gain insights from emerging talents within the commercial real estate. Panelists included professionals who have recently entered the industry. The panel established a relatable connection with club members, as the panelists were recently in their shoes, navigating job searches and pondering the initial steps of their careers. The culmination of this panel with an open Q&A session fostered a supportive environment, enabling students to pose meaningful questions without feeling intimidated, a sentiment that can occasionally arise when interacting with seasoned executives or long-established professionals in the field.



CRE YOUNG PROFESSIONALS PANEL LINE UP
(above left to right):

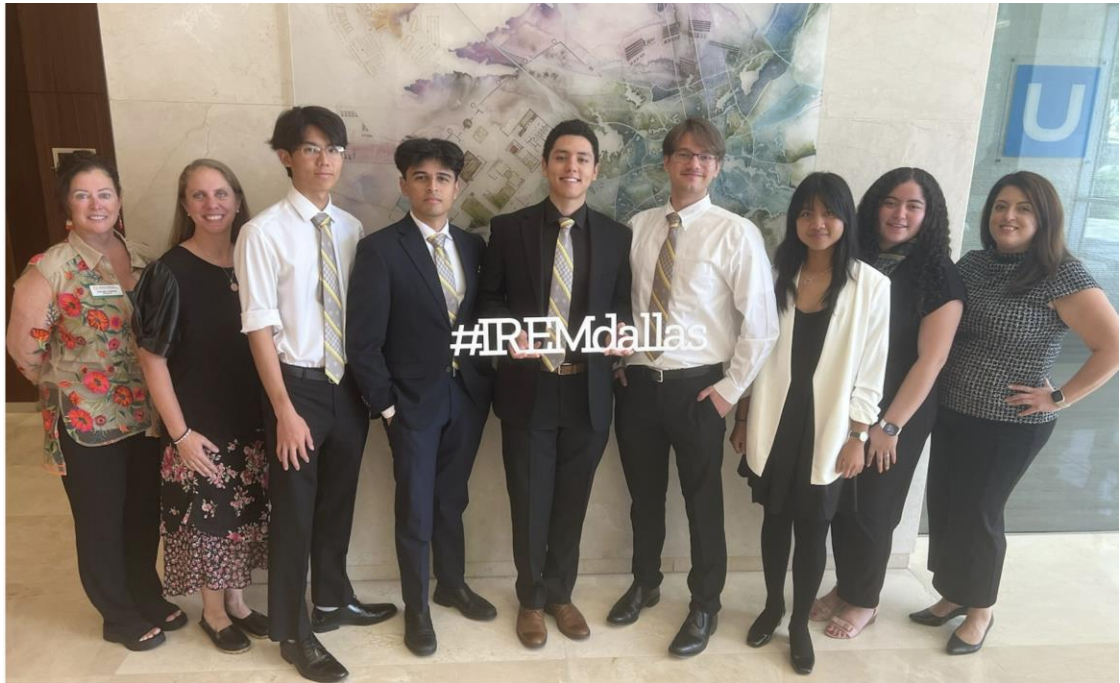
- Mark Ready, Bradford Commercial Real Estate Services
- William Holland, Bigger Picture Holdings
- Abubakar Jalloh, Bank of America and UTD BS 2021
- William Holland, Bigger Picture Holdings
- Patricia Lu, Bank of America and UTD BS 2014 Alumni
- Carrie Halbrooks, Cushman & Wakefield
- Elijah Emert, Billingsley Company/UTD BA 2018 & MBA 2021, past Real Estate Club at UTD Board member



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September 8, 2023 IREM Case Competition Kick-Off Event



(left to right): Professor Lynch – Director of the Weitzman Institute for Real Estate, Stephanie Howard (IREM Member Case Coach) with FHLB Dallas, Eric Wang, Sharv Save, Manuel Del Castillo – Real Estate Club at UTD Board member, Noah Bowes, Yesmine Keopaseut, Emily Sandoval Real Estate Club at UTD Board member and Kendra Makers (IREM Member Case Coach with W3).

The IREM Case competition kickoff event was held at Granite Park in Plano Texas. The impressive venue gave students the opportunity to see what a true class A office property is and provided collaborative meeting spaces for the teams. IREM University Chair Christie Clenney, CPM and senior property manager for Remedy Medical Properties welcomed students from The University of Texas at Dallas, Southern Methodist and North Texas University. She shared the IREM industry association mission, assigned two IREM member coaches to each team and presented the Bent Tree Green Management Plan Case.

Students then traveled to the subject property for a walking tour to meet with the property manager and to learn more about the improvement opportunities for the management plan case challenge. Each team meet with their coaches three times for guidance over the three weeks leading up to the competition presentations.



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September 20, 2023 Recruiting Roundtable

The Recruiting Roundtable event was hosted with two industry experts, Angela Gorbold and Pamela McKoin from SEO, a non-profit organization committed to supporting college students in obtaining high-quality internships. Real Estate Club at UTD members were able to acquire valuable insights, refine their career strategies, and connect with like-minded peers who share a passion for real estate.

The event was moderated by Real Estate Club at UTD Board member Manolo Del Castillo, pictured on the right in the middle of the screen.

CAREERS IN CRE

REAL ESTATE

- Capital Markets
- Acquisitions
- Asset Management
- Corporate & Business Services
- Property Management
- Investor Relations
- Brokerage
- Development
- Portfolio Management

What is Commercial Real Estate?

- Opportunity to create thriving communities where people live, work and play
- Build and invest in various locations and property types

Key Skillsets

- Understanding of financial and real estate metrics
- Relationship builder and negotiator
- Strong communicator, problem-solver, and multi-tasker
- Analytical mindset

Video call participants: Pamela (Guest), Del Castillo, Manuel, Angela.

(pictured on right, top to bottom): Angela Gorbold, Manuel Del Castillo, Pamela McKoin



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September 27, 2023

CBRE Virtual Case Study

Peter Kelly, Senior Vice President and broker at CBRE Colorado, walked club members through a virtual case study of a medical building. He discussed the development project from start to finish. The opportunity was the result of a long-term health care client reaching out to Pete's team wanting to find another location for a new Hospital in Greeley, Colorado.

Peter discussed how the CBRE team found the location and performed due diligence before ever hitting the ground. After the due diligence was complete, Kelly talked about the phases of developments and various challenges that were presented along the way.

He finished the virtual case study by showing attendees the fully completed development of the building and the surrounding parking. At the very end, Pete provided an opportunity for a Q&A session allowing students to ask questions beyond the scope of the case study and into different intricacy of the real estate industry.



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September 27, 2023

Mortgage Banks Association Annual Texas CREF Discussion

UTD graduate students attended the Southern Methodist University Folsom Institute for Real Estate and Mortgage Bankers Association (MBA) annual Texas CREF Discussion & Company Networking Event. Students from **UTD, TCU, UNT, UT-Arlington, A&M, and Texas Tech** were also in attended the event.



UTD students pictured above (*left to right*): Jaqleen Phan, Krithika Sangareddypeta, Mithun Ravi Teja Reddy Vennapusa, Sai Teja Sunkara, Matthew Miller, Abhinav Kavva and Sultan Obeid



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September 29, 2023

Company Visit Lunch and Networking with GID Industrial

GID, a real estate firm with a focus on the industry sector, hosted an intimate group of Real Estate Club at UTD members at their office. They provided participants with lunch and time to network with employees in different positions at their company. Company representatives ranged from asset management, acquisitions and brokerage. Students learned about GID operations, their investment strategy and went through two large industrial development deals. The presentation offered insight towards the life cycle of a CRE investment. Participants learned that it takes multiple parties to accomplish a development investment. The hosts touched briefly on cash distributions and focused a lot on the timeline and phases of a development.

At the conclusion of the event, GID talked about their internship programs and showed students how to apply.



(picture left to right): Alex Hannie– UTD MBA student and Real Estate Club at UTD Board member, Paxton Baird - GID and Real Estate Club at UTD president James Hunsinger and UTD MBA student.



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September 29, 2023

IREM Case Competition Results

UTD Wins 1st Place

Our undergraduate students WON the IREM real estate Case Competition today! Other competing schools included Southern Methodist University and University North Texas. They won \$5,000.

The case competition kicked off September 8, 2023. IREM assigned each participating undergraduate team two IREM members, who are property management professionals as coaches to provide guidance and mentoring.

The case objective was for students to develop a property management plan to maximize the value of the Bent Tree office property. The property is ~72% occupied, has several deferred maintenance items and is in need of a major renovation. The judges said UTD had a cohesive management plan that connected their research, analysis and ideas end-to-end to their final recommendations.



(2ND Row standing left to right UTD Students): Stephanie Howard (IREM Case Coach) FHLB Dallas, Emily Sandoval, Eric Wang, Manolo Del Castillo, Yesmine Keopaseut, Noah Bowes, Sharv Save, (IREM Case Coach) Kendra Makers - W3.

(1st Row seated IREM Judging Panel) Rich Elam – Silver Star Properties REIT, Inc. , Greg Wingate – City of Fort Worth, Morgan Neely – Stream Realty Partners, Greg Grainger – Younger Partners, Adam Bernhardt – JLL



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October 4, 2023

Weitzman Executive Speaker Series

“Economic Update and Impact to CRE”

The Weitzman Institute for Real Estate Executive Speakers Series hosted an informative and successful economic update event at The University of Texas at Dallas (UTD) which shed light on the evolving economic landscape and its implications to real estate, specifically within the Dallas Fort Worth (DFW) metropolis. Keynote speakers, were Wayne Gearey, PhD, Cody Gibbs, and moderator Julie Lynch, Director of the Weitzman Institute for Real Estate at UTD, who provided valuable insights into the current economic climate and its impact on the local real estate market.

Attendees included Advisory Panel members of the Weitzman Institute for Real Estate at The University of Texas at Dallas Herb Weitzman and Bob Young – Weitzman, Bill Guthrey, KDC Real Estate Development (pictured below on right), CRE industry professionals, graduate and undergraduate students.



(left to right): Wayne Gearey, PhD – Chief Labor Officer at Savills/UTD Lecturer and Cody Gibbs - Interim Manager / Economic Development Analyst The University of Texas at Dallas



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October 11, 2023

Elan at Bluffview Site Visit

Red Summit Partners

Real Estate Club at UTD members had the opportunity to join Ryan M. Akins, Managing Partner at Red Summit Partners, for a property tour. The experience was truly enriching as it provided students with a deeper understanding of multi-family properties.

Ryan's expertise shed light on various aspects of real estate investing from market dynamics to strategic investment techniques, unveiling the crucial factors that contribute to success in the multi-family real estate industry. Beyond just walking the properties, the tour also gave participants the chance to engage in insightful discussions, allowing students to grasp the intricacies of property management, maintaining positive tenant relationships, and how broader economic factors shape the multifamily market.



left to right: Sultan Khaled Obeid, Akhil Sakhamuri, Matthew Miller, Ryan Atkins, Manager Principal of Red Summit Partners, LLC, Manuel Del Castillo, Alex Hannie, Emily Sandoval, Yesmine Keopaseut



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October 19, 2023 Lunch & Learn Dogwood Commercial

The lunch and learn was hosted by Scott Eiting, Senior Vice President of Retail at Dogwood Commercial with special guest Ben Appleby, CEO for Dogwood Commercial. Participants learned the essential techniques to evaluate potential property acquisitions, including market analysis and financial assessment. Scott and Ben's expertise in underwriting and risk assessment provided invaluable insights for both budding investors and real estate enthusiasts.



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October 24, 2023 CREW Panel

CREW (Commercial Real Estate Women) Dallas chapter has a powerful network that creates success for women in commercial real estate. With an average membership of 350 each year in CREW Dallas and over 17,000 CREW members across the United States and internationally is the leading organization for decision-making executive women, providing opportunities for networking, education, leadership development and civic/philanthropic involvement.

This semester the Real Estate Club at UTD hosted a five-member CREW panel who spoke about their careers in CRE and how each of them play a role as stakeholders within a transaction. The panelists included: Najdi Rafaty - Principal at LiNC Commercial Realty, Kirsten Evans - Debt & Equity Analyst at Northmarq, Brenna Wadleigh - CEO at N3 Real Estate, and Shelly Maurer - Senior Counsel at Hallett & Perrin, P.C.



Picture on Left (left to right):

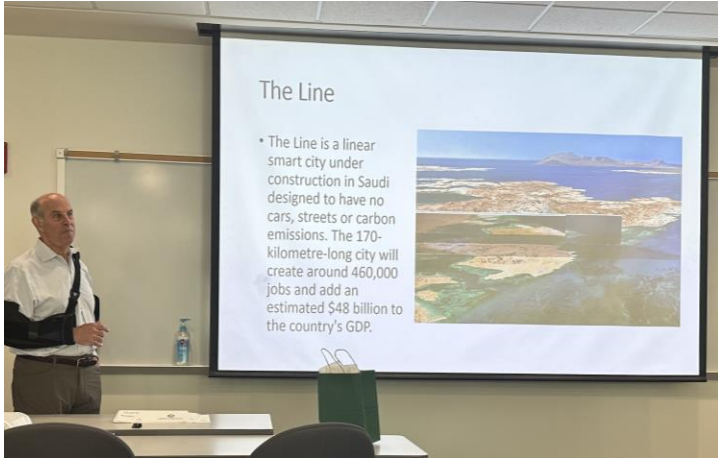
Emily Sandoval - CREW Panel moderator Real Estate Club Board member, Shelly Maurer, Senior Counsel with Hallett & Perrin, P.C., Najdi Rafaty - Principal at LiNC Commercial Realty, Katrina Kieu – CREW panel moderator and Real Estate Club Board member, Kirsten Evans, Debt & Equity Analyst with NorthMarq, Brenna Wadleigh, CEO, of N3Real Estate.



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October 30, 2023 "The Pros & Cons for HOA model for Development"



Jon Shapiro, Partner at Onpoint Leadership, provided insight into the proliferation of HOAs and Community Associations in the real estate management and development industry. Students learned about some of the real-time real-world applications of how real estate is being managed for value maximization by institutional players.

Guest speaker Jon Shapiro
Partner Onpoint Leadership



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November 1, 2023

Northmarq Company Round Table Event

Northmarq, the largest private real estate firm in the nation, visited the UTD campus with five different representatives. All of these professionals were in different areas of the company.

Students in groups of seven to ten, rotated from round table to round table with different Northmarq professionals and learned about what each professional does on a day-to-day basis.

Each of the Northmarq team members talked about their role in a real estate transaction, some of the challenges that commonly arise, and how they found themselves in their current positions.

The rotational format allowed students to learn about brokerage, Fannie MAE/ FHA platforms, debt and equity, loan servicing, and underwriting all in one event. At the conclusion of the program, Northmarq participants spoke about their internship program and talked about how to apply.



left to right: Matthew Miller, James Hunsinger, Sara Briley, Jay Donaldson, Charles Hubbard, Daryl Wilson, Kevin Leamy, Emily Sandoval and Alex Hannie



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November 2, 2023 Golf Ranch – Social Event

The Real Estate Club at UT Dallas hosted a social event for club members at the newly renovated Golf Ranch adjacent to UTD's campus. Members enjoyed pizza and refreshments under the golf bays while hitting balls on the driving range. The social event was an excellent opportunity for club members to build their network in the Weitzman Institute for Real Estate community, share their unique experiences and passion for real estate with each other.



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November 6, 2023 COMMUNITY SERVICE “Feeding My Starving Children”



One in nine persons each day is food insufficient in the world. Real Estate Club at UTD members hand-packed **nutritious "MannaPack" meals** specifically designed to assist in reversing and preventing undernutrition.

THE RESULTS

 Pack again soon! | fmsc.org | [#fmsc](https://twitter.com/fmsc)
Boxes packed: 87
Meals: 18,792
Kids fed for a year: 51
Cost: \$5,449.68
riverification@fmsc.org
Session #1 1.75 hrs
11/06/23

The Real Estate Club at UT Dallas participated in a community service event with Feed My Starving Children in Richardson. This event was an opportunity for the club to give back to the local community. Our club members enjoyed devoting their time to packing nutritious meals for children in need across the globe.

Picture to the Right: Real Estate Club at UTD Board members Alex Hannie, Matt Miller, Sai Sunkara, Akhil Sakhamuri, Club members and Professor Lynch – Director of the Weitzman Institute for Real Estate.



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November 9, 2023

Weitzman Property Tour

The University of Texas at Dallas real estate program donor Herbert D. Weitzman's company hosted a retail property tour. Weitzman is a retail commercial real estate firm based out of downtown Dallas. The property tour took place at mature retail center Dal-Rich Towe Square with theme of continual change to stay relevant in changing times.

Weitzman had many of their employees participate in the property tour and discuss the different area of the company as toured different areas and stores at the property. Student participants learned about how the Weitzman company operates in brokerage, asset management, leasing, and property management to help support, ensure their tenant's success while ensuring a great customer experience. As the property tour progressed each Weitzman professional took turns explaining how their position fits into the acquisition, operations and maintenance of the retail center.

At the conclusion of the tour club, members went to a restaurant for a general Q&A session. Students asked questions about the property, retail real estate, and personal and professional development as a commercial real estate professional.



Weitzman team members included Bob Young Executive, Managing Director, Guillermo Lopez, Leasing Associate, UTD REAL (Real Estate Alumni Leader) and former Real Estate Club at UTD Board member, Bernard Shaw, Senior Vice President, Augustus Prickett, Associate, Ben Terry, Vice President | Director of Portfolio Leasing, and Carrie Thomas, Marketing Manager | Shopping Center Marketing .



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Saturday - November 11, 2023

ARGUS Cash Flow Analysis Workshop

9 a.m. to 4 p.m.

Four graduate and thirteen undergraduate students participated on a Saturday in the hands-on modeling ARGUS Cash Flow Analysis workshop. Students learned how to model an industrial and office cash flow including debt service, investment rates and valuation. The workshop was taught by Professor Lynch, Director of the Weitzman Institute for Real Estate. Each participant earn a certificate of completion.



left to right graduate students:
James Hunsinger – President and
Matthew Miller – Vice President
Real Estate Club at UTD.



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November 14, 2023 NTCAR Job Half Day Shadowing Day

Club members had the opportunity to shadow North Texas Commercial Association of Realtors members who are industry leaders from the following firms:

Venture Commercial, CivTech, Catalyst, Herrin Commercial Real Estate, REATA Commercial Realty, Bradford, Newmark, Ryan Companies US, Northern Trust, Fischer, William Roth, MODD Real Estate, LiNC Commercial Realty, SVN Veler Commercial, Edge Realty Partners, M&D Real Estate Group, JLL, Colliers International and Hudson Peters Commercial.

Our students spent a half day on-site at the workplaces or owned assets of these firms for a day-in-the-life experience, gaining exposure to professionals and practices in the real estate segment their mentor work in commercial real estate. This was an excellent networking and educational opportunity for our members.



left to right: Allyson Yost, Senior Vice President, Colliers International and Komal Chakravarthula.



left to right Rohith Nair and Kevie Beard, Partner, Venture Commercial



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November 14, 2023 Lunch & Learn PGIM

The Real Estate Club at UT Dallas hosted a lunch and learn with Keith Kehlbeck, Executive Director of Investment Operations, and Michele Fernandez, Vice-President of Loan Servicing, from PGIM. They provided lunch for our club members and held a roundtable discussion centered around PGIM's real estate operations.

PGIM and students were able to discuss the investment operations and loan servicing business segments and how it plays into PGIM's overall strategy. Students had the opportunity to analyze case studies on two different assets where Keith and Michele shared with challenges their firm faced. Club members were able to ask questions to better understand the reasoning behind various investment decisions.



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November 16, 2023 NAIOP Lunch & Learn

Jake Marks with Trammel Crow Company brought lunch and walked students through a case study of a large industrial project in the University Park area of Dallas he was involved with, teaching students about the challenges of the life cycle of an asset from land acquisition, construction, and leasing to the sale of the property (and everything in between). There was a valuable question and answer session following the presentation of the case.



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RESUME BOOK

for Internships in Brokerage, as a
Financial Analyst, Real Estate Investing
and Marketing

FALL 2023



Herbert D. Weitzman
Institute for Real Estate



THE UNIVERSITY OF TEXAS AT DALLAS
Naveen Jindal School of Management

Divyesh Asmani

Dallas, Tx, 75252 | +1 (760) 927 2681 | Divyesh.Asmani@utdallas.edu | <https://www.linkedin.com/in/divyesh-asmani>

EDUCATION

Master of Science in Finance | The University of Texas at Dallas, Texas | May 24 | **GPA 3.67**

Bachelor of Engineering in Instrumentation & Control | Gujarat Technological University | June 21 | **GPA 3.40**

TECHNICAL SKILLS

Certifications: Mutual Fund Distributor – VA, Bloomberg Market Concepts (BMC), FactSet

Programming: R Programming, Python, SQL

Software: ARGUS modeling, MS Excel, PowerPoint, Word, PowerBi, Outlook, Tableau, Tome Ai, ChatGPT (prompts).

Databases: FactSet, Crunchbase, Refinitiv Workspace, Capital IQ, Bloomberg

ADDITIONAL

Languages: English, Hindi, Gujarati

Eligibility: Eligible to work in the US for internships and full-time for up to 36 months on F1 Student Visa under the STEM. I

possess a valid driving license and SSN

PROFESSIONAL EXPERIENCE

Teaching Assistant | The University of Texas at Dallas, Tx

Aug 23 – Present

- Assisted Dr. Hirofumi Nishi in Financial Management and Prof. Julie Lynch in three Real Estate courses, serving **150 students**.
- Employed dynamic teaching techniques and maintained strict time management across multiple classes.
- Managed and assessed diverse assignments, ensuring consistent and fair scoring.
- Offered real-world examples and continuous learning/feedback, fostering an enriched learning environment during TA hours.

Financial Compliance Assistant | The University of Texas at Dallas, Tx

Dec 22 – Aug 23

- Spearheaded the enhancement of internal controls, achieving flawless compliance in the UTD system and innovating a process that boosted One Card program efficiency by 20%.
- Analyzed and ensured compliance for **35,000 transactions totaling \$7M**, using tools such as Excel, PowerPoint, and SQL Query for detailed reporting. Extensively used Excel Functions like Vlookup, Data Tables, Pivot Tables, optimization, and Macros.
- Regularly synthesized and presented complex financial data, enhancing transactional clarity and accuracy.
- Pioneered a culture of mentorship, guiding new team members through financial compliance and sophisticated internal controls.

Finance Development Intern | Enkay Investments, Surat, India

Sep 21 – March 22

- Advised **50+ clients** on tailored investment products, aligning with their risk profiles and investment goals.
- Revamped client database maintenance, bolstering engagement and streamlining follow-ups.
- Crafted and delivered influential client presentations, fostering strong, strategic partnerships.
- Analyzed 10+ Mutual Funds and Portfolio Management Services using advanced analytics for informed decision-making.

ACADEMIC PROJECT EXPERIENCE

- Created FP&A model for Mercury Athletic Footwear (HBR Case Study) Valuing different business opportunities and presenting them with appropriate **Valuation models** and outcomes, **July 2023**
- Created financial models for an “Industrial” and an “Office” space using ARGUS in the “**ARGUS** workshop” arranged by the Real Estate Club at the UTD, **Nov 2022**
- Analyzed stock returns, correlation, variance, and standard deviation using excel as a group project “Mathematical Methods for Finance” using **Advanced Excel** at UTD, **Oct 2022**
- Created a visual dashboard for “Sales over geography” and “Sales over time” at the **Power Bi** boot camp at UTD organized by Envision Cub, **Oct 2022**
- Created a visual dashboard for “Employee Satisfaction” to reduce Attrition at the **Tableau** boot camp at UTD organized by Envision Club, **Sept 2023**

COMPETITIONS & LEADERSHIP EXPERIENCE

- Awarded Best Intern award at Experts-hub Training & Internship program for completing the project and leading a team of 10 participants at Savitribai Phule University, Pune
- International Society for Automation, Student Chapter SARVA, Treasurer from Aug 2019 to Feb 2021
- Secured 1st position in Entrepreneurship Project Awareness Camp organized by EDC cell, SCET, GTU
- Elected as a Class Representative for the freshmen year in the academic year 2017-2018

MADHUR SUNIL CHAUDHARI

Richardson, TX, 75080; 945-257-5742; madhur.c6@gmail.com LinkedIn: <https://in.linkedin.com/in/madhurchaudhari>

EDUCATION

The University of Texas at Dallas (UTD)

Master of Science, Finance

Herbert D. Weitzman Real Estate Fellowship recipient

December 2024

GPA- 3.7

Institute of Chartered Accountants of India (ICAI)

Chartered Accountant, Accounting and Finance

January 2017

Savitribai Phule Pune University

Bachelor of Commerce, Statistics

April 2014

PROFESSIONAL EXPERIENCE

University of Texas at Dallas

Graduate Teaching Assistant – Financial Management course

May 2023- Present

- Educated 20+ students in Financial Management focusing on assignments and projects boosting “A” grades by 15 students.
- Planned, budgeted, and hosted events like case competitions, lab workshops, and guest lectures with an attendance of 80+.
- Formulated on various financial modeling valuation assignments, real estate market studies, and report writing.

CRISIL Global Research and Risk Solutions

Senior Risk Analyst – Wholesale Lending Quality Assurance (QA)

March 2022- December 2022

- Revamped quality assurance process in Wholesale Lending for MNC bank leading to a 40% surge in operational efficiency.
- Trained and mentored a proficient team of 10+ assurance officers, adeptly overseeing script testing across business functions.
- Analyzed data, shared results with business leaders, and cut policy deviations by 28%.
- Acknowledged with an 'Excellence Award' for exceptional work in risk advisory, team leadership, integrity, and accountability.

MNM Wealth Management

Co-Founder

January 2021- March 2022

- Conducted marketing campaigns, nurtured leads, and boosted asset growth by 190% through sales and cross-sales of products.
- Researched potential investment areas and prepared tailor-made plans to satisfy the investment needs of the clients.
- Conducted webinars and information sessions in small corporations to educate about various saving instruments in capital markets.
- Mentored a team of 2 analysts to lay out sales and operations processes from lead generation to onboarding clients.

Bajaj Housing Finance Limited

Credit Analyst- Wholesale Lending (Residential & Commercial Real Estate Financing)

December 2017- January 2021

- Provided strategic planning on the formulation of real estate funding transactions to residential and commercial real estate builders.
 - Credit Underwriting and transaction advisory in more than 50 real estate deals with a cumulative value of more than USD 1250 M.
 - Engaged with customers to understand project execution and business strategy to advise the most suitable debt-equity structure.
 - Pitched appraisals to top management, articulating the outcome of in-depth financial due diligence, financial analysis, ratio analysis, cash flow models, and market analysis using tools like Microsoft Excel, Word, and PowerPoint.
 - Thoroughly scrutinized micro markets, financial statements, forecasted sales and cash flow, sensitivity analysis, and analyzed property cost components using Excel models to effectively mitigate credit risk.
 - Rewarded as ‘Sprinter’ and promoted by Bajaj Housing Finance Ltd for simultaneously working on 5 deals.
-

ORGANIZATIONS:

Graduate Finance Management Council, UTD- Treasurer

May 2023 – Present

The Real Estate Club, UTD

January 2023 – Present

COMPETITIONS:

- **Fin-Hack Competition, UTD** : Secured **3rd place** in Fin-Hack organized by the Finance Lab, UTD in March of 2023.
 - **Excel Financial Modeling, UTD** : Secured **2nd place** in Excel modeling organized by the GFMC, UTD in April of 2023.
-

CERTIFICATIONS: CFA Level 1, Costar, Bloomberg, FactSet, Refinitiv

SOFTWARE: Eikon Datastream, SDS Platinum, Microsoft Excel, Tableau, Capital IQ

ADDITIONAL INFORMATION:

- **Languages:** English, Hindi, Marathi
- **Eligibility:** Eligible to work in the U.S. for internships and for full-time employment for up to 36 months without sponsorship.

Jonathan Garcia

Nevada, Tx, 75173; (214) 710-9195; jonathangar2354@gmail.com
www.linkedin.com/in/jonathangarcia2354

EDUCATION EXPERIENCE

The University of Texas at Dallas

Bachelor of Finance, Concentration in Real Estate
Academic Excellence Scholarship Recipient

May 2024

Richland College, Dallas, Tx

Associate of Science, Finance, Collegiate High School Student

May 2021

PROFESSIONAL EXPERIENCE

Wood Flooring Contractor, DFW Metroplex

January 2016 – Present

- Generated 15 cost estimates per month, resulting in an average of 12 projects scheduled
- Operate, clean, and maintain flooring installation equipment and tools
- Interact with 15+ clients per day in either Spanish or English extending sales reach
- Assess strengths and weaknesses weekly with a plan to improve for the following week

Metal Construction Material Salesman, from home

March 2023 – Present

- Discuss customer needs for construction material according to projects resulting in both company and consumer benefit
- Generated more than \$80,000 in sales of metal construction material in a span of less than 6 months
- Retain contact will almost 100% of customers to promote strong-prolonged connections for future business with repeated buys from customers from the start
- Promote products using social media to gain reach and expand to local and surrounding markets
- Master the use of Facebook Marketplace, as well as Instagram and TikTok sales generating more than 75% of total sales

Marketing Representative for Currency Trading Platform, Remote

January 2021 – January 2023

- Assessed client needs to determine markets to invest with over 88% satisfaction rate
- Researched foreign exchange financial markets to determine where the market is and where the market is going
- Advised of particular currencies/investments based on market trends to get more than 8% returns for customers
- Developed strategies to capitalize on emerging opportunities within the currency market all while staying within the plan
- Advised over 65 people and led teams towards success within the marketing side of the education platform

ORGANIZATIONS AND LEADERSHIP EXPERIENCE

Social Impact Marketing Fundraising Project, UT Dallas, Project Leader

August 2023 – December 2023

- Maintain effective communication within group to promote teamwork
- Schedule necessary and supplementary meetings for work completion
- Communicate with project sponsors to maintain an understanding of project scope and direction of the project
- Execute plans with confidence but with flexibility to adapt to any possible changes

Catholic Charities of Dallas, Application Processing Assistant

August 2019 – August 2021

- Demonstrated competence with Excel to input client information
- Collaborated with event sponsors and managers to run events
- Analyzed data to then interpret trends/patterns within the community

TECHNICAL SKILLS

Certifications: MS Office Specialist for Excel

Software Tools: MS Excel, MS Word, MS Powerpoint

Other: Computer Troubleshooting expertise

ADDITIONAL INFORMATION

Languages: Fluent in Spanish

Eligibility: US Citizen, Eligible to work in the US for internships and full time with no restrictions

Nayeli Lira Gomez

Dallas, Tx.; 469-740-9662; Nayeli.lira123@gmail.com

www.linkedin.com/in/nayeli-lira-gomez

EDUCATION

The University of Texas at Dallas

May 2024

Bachelor of Science in Finance with a Concentration in Real Estate Management

Eastfield College, Mesquite, Tx.

May 2020

Associate of Science, General Science Studies

GPA 3.50

PROFESSIONAL EXPERIENCE

Charles Schwab, Westlake, TX.

September 2023 – April 2024

Investor Services Intern

- Engaged with 30+ Schwab clients per day resolving their concerns
- Collaborated with team of 5 outlining recommendations for workplace efficiency and presenting recommendation to executive leadership
- Shadowed and engaged in 10+ senior management meetings with Director documenting and addressing all concerns outlined

Dillards, Garland, TX.

April 2022 – August 2022

Lingerie Department Manager

- Led department team of 6 outlining sales goals daily in morning meetings ensuring goals were met or exceeded
- Informed team of new department practices leading to increased sales performance
- Maintained the department floor merchandised and updated to current trends increasing monthly sales by 15%
- Implemented departmental breast cancer fundraising events resulting in 90% increase in monthly sales

Forever 21, Mesquite, TX.

February 2019 – January 2022

Assistant Store Manager

- Oversaw store operations ensuring compliance and responsible for \$7K+ store sales cash deposits daily
- Led team of 35-50: created schedules, ordered supplies, sorted shipments, and communicated updates on store
- Trained 45 newly recruited and current team member resulting in a 2% turnover rate
- Oversaw weekly payroll of \$10,000 for 35-50 employees
- Analyzed daily sales against target implementing strategies to avoid sales decrease resulting in average of 30% monthly revenue increase

Pharmacy and Surgical Supplies, Dallas, TX.

May 2019 – August 2019

Pharmacy Technician

- Dispensed medication for 50+ prescriptions per day with 100% accuracy
- Prepared and placed labels on bottles and vials, called patients, and organized delivery routes

Trust Group Inc., Farmers Branch, TX.

August 2017 – June 2018

Recruiting Assistant Intern

- Audited 75+ resumes on recruiting websites for possible candidates while assisting with general administration

ADDITIONAL INFORMATION

Technical Skills: Microsoft Excel, Word, SQL, Tableau, ARGUS

Certification: Life and Health Insurance License

Languages: Fluent in Spanish

Eligibility: US Citizen, Eligible to work in the US with no restrictions

Mohamed Adam Landolsi

Richardson, TX, 75080; 469-924-7007; mlandolsi99@hotmail.com
www.linkedin.com/in/m-adam-landolsi-b99393aa

EDUCATION

The University of Texas at Dallas December 2024
Master of Science in Finance (MS FIN), Finance **GPA 3.80**

Concordia University – John Molson School of Business, Canada December 2021
Bachelor of Commerce, Finance **GPA 3.50**

The American University of Sharjah, United Arab Emirates May 2019
Bachelors in Business Administration, Finance **GPA 3.80**
Dean's and Chancellor's list two years in a row

PROFESSIONAL EXPERIENCE

LP Analyst, Dallas, Texas October 2022 – Current
Private Equity Analyst

- Organizing and evaluating more than 100 Private Equity, Venture Capital, Real Estate, Real Asset, Infrastructure and Credit strategies that helped enhanced clients' overall decision making.
- Analyzing and structuring private asset fund financial data, including performance, underlying investment, and cash flow details of funds with more than 100B AuM
- Coordinating with private asset managers to collect relevant data and assisted in developing a new tracking system that increased data collection by 20%

ESB LLC., France (Paris) June 2017 – August 2017
Summer Intern

- Acquired construction and renovation materials and delivered them on-site in a timely manner to teams working on the renovation of on-site restaurants.
- Collaborated with the management team with clerical tasks such as filling out order checks, coordinating payments with suppliers, and following up with delivery.
- Developed a business proposal that improved business operations and increased efficiency by 135%.

ACADEMIC PROJECT EXPERIENCE

Technical Analysis Project, Concordia University – FINA 408 January 2021– April 2021

- Developed and back tested a trading system using both technical and fundamental analysis.
- Used TradingView's Pine Script language to develop the non-discretionary trading system that enhanced returns by over 25%.

Investment Analysis Project, Concordia University – FINA 410

- Valued two Canadian recreational vehicle companies and provided investment thesis using the DCF model based on more than 10 comparable company valuations.
- Forecasted the 3-financial statements for the two companies and developed projections for performance over a 5-year horizon.

VOLUNTEER ORGANIZATIONS

Friends of Cancer Patients, Volunteer January 2018 – March 2018
IWAS Special Olympics, Activities Coordinator and Volunteer January 2018 – March 2018

ADDITIONAL INFORMATION

Skills: Excel, PowerPoint, MySQL, Python, RStudio

Languages: French, English, Arabic

Eligibility: US Citizen, Eligible to work in the US for internships and full time with no restrictions.

RESUME BOOK

for Permanent Jobs

Fall 2023



Herbert D. Weitzman
Institute for Real Estate

BROKERAGE

Permanent Jobs



**Herbert D. Weitzman
Institute for Real Estate**

Jamari Taye Bowers

Dallas, Texas; (346)-252-2078; jtdbowers@gmail.com
<https://www.linkedin.com/in/jamaribowers/>

EDUCATION

The University of Texas at Dallas

May 2024

Bachelor of Science, Finance - Real Estate Investment Management Track

PROFESSIONAL EXPERIENCE

PGIM Real Estate

June 2023 – Present

Asset Management Intern

- Processed borrower requests on Prudential's general account for loans valued up to \$250 million.
- Prepared credit action case plan writeups for leasing and SNDA requests.
- Developed impact analysis inclusive of local market conditions, property operating data, and relevant loan provisions for lease consents.
- Maintained communications with borrowers regarding post-closing and other loan obligations.
- Received and processed preliminary lien notices inclusive of communicating with the borrower for a resolution and documenting in Loan Connect.
- Contributed to bi-weekly departmental pipeline meetings to maintain company workflow.

Simisola Holdings LLC

November 2021 – June 2023

Investment Analyst

- Conducted market research on residential properties in the Greater Houston area.
- Analyzed investment opportunities on properties up to \$1 Million in value.
- Organized and presented CMA reports to stakeholders using Microsoft Excel.
- Processed tenant rent roll payments and executed maintenance requests.

HARRIS Manufactured Housing & Commercial Brokerage

March 2022 – September 2022

Research Associate

- Utilized Instant Checkmate and thorough research to gather ownership data of properties valued up to \$20M.
- Conducted cold calls to confirm property and owner contact information.
- Maintained database in ArcGIS to provide current and accurate information for senior associates.

ACADEMIC PROJECTS & RELEVANT COURSEWORK

- Real Estate Valuation (Capstone Course Project) October 2023 – December 2023
 - Utilized market and financial analysis skills to make the best decision for a development project.
 - Collaborated with group members to prepare and present findings and suggestions.
- Real Estate Law and Contracts
- Real Estate Finance and Principles
- Real Estate Markets and Investments
- Commercial Property Risk Management and Insurance

ORGANIZATIONS AND HONORS

Real Estate Club, UTD

August 2020 – Present

Undergraduate Success Scholars, UTD

August 2020 – Present

Black Student Alliance, UTD

August 2022 – Present

Davidson Management Honors Program, UTD

August 2020 – January 2022

ADDITIONAL INFORMATION

Technical Skills: CoStar, Loan Connect, ARGUS, Excel, Microsoft Office, Zoom, Google Suite, ArcGIS, Think-Cell.

Languages: Native English

Eligibility: US Citizen. Eligible to work in the US with no restrictions. Willing to relocate for work.

Jonathan Garcia

Nevada, Tx, 75173; (214) 710-9195; jonathangar2354@gmail.com
www.linkedin.com/in/jonathangarcia2354

EDUCATION EXPERIENCE

The University of Texas at Dallas

Bachelor of Finance, Concentration in Real Estate
Academic Excellence Scholarship Recipient

May 2024

Richland College, Dallas, Tx

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August 2019 – August 2021

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- Collaborated with event sponsors and managers to run events
- Analyzed data to then interpret trends/patterns within the community

TECHNICAL SKILLS

Certifications: MS Office Specialist for Excel

Software Tools: MS Excel, MS Word, MS Powerpoint

Other: Computer Troubleshooting expertise

ADDITIONAL INFORMATION

Languages: Fluent in Spanish

Eligibility: US Citizen, Eligible to work in the US for internships and full time with no restrictions

Christopher Gilmore

214-815-8984 | christopher.gilmore98@gmail.com | [linkedin.com/in/cgilmore98](https://www.linkedin.com/in/cgilmore98)

Education

Bachelor of Science, Finance – Real Estate Concentration

December 2023 GPA 3.5

Comet Transfer Scholarship

The University of Texas at Dallas

Certifications & Technical Skills

Operation Systems: Windows | QuickBooks | UTD Argus Course Completion | CoStar | Project Destined Financial Modeling Certification

Technical: MS Office | SharePoint | Workday | Excel | Word

Relevant Course Work

Real Estate Principles | Real Estate Finance & Principles | Investment Management | Real Estate Law & Contracts | Real Estate Valuation

Experience

Project Destined

September 2023 – October 2023

Research Analyst Internship

- Collaborated with a team of 8 for market research, property analysis, valuation, and deal financing.
- Completed Financial Modeling Certification led by Graduate School professors at NYU/Associate at Brookfield Properties.
- Prepared and presented investment memo to professionals from Brookfield Properties.

State Farm Corporate Office

May 2023 – August 2023

P&C Underwriting Internship

- Researched and developed recommendations for enhancing State Farm and their future role strategies and future technology.
- Developed and implemented templates to monitor daily task touchpoints, enabling identification of gaps in underwriters' handling and process efficiency.
- Collaborated with peer interns to analyze productivity at home compared to that in the office for production employees.

State Farm Corporate Office

May 2022 - August 2022

P&C Claims Internship

- Resolved payment discrepancies and ensured payments were issued promptly to appropriate parties.
- Cooperated with accounting to reconcile accounts to ensure consistency throughout multiple customer accounts.
- Reviewed estimates received from partners or non-partners to ensure costs aligned with the loss.

Projects

Luna Blanca

September 2023 – October 2023

- Researched and presented a property analysis, valuation, and deal financing of an existing property near the Bishop Arts District.

AI and the Impact on Future Role Strategy

May 2023 - August 2023

- Researched and presented to Team Managers and the Vice President of Operations of Richardson/Dallas the impacts of AI in the Property & Casualty Insurance space, the impact these will have on State Farm, and future roles.

Impact of Inflation to State Farm

July 2022 - August 2022

- Researched the impact of inflation on State Farm products and presented ideas on how to mitigate the effects by reducing costs to several Team Managers and the Vice President of Operations of Richardson/Dallas.

Investment Management Project

April 2022 - May 2022

- Analyzed historical data of 11 stocks from the S&P 500 to make predictions of their performance and constructed portfolios with different risk tolerances, where \$5,000 dollars were invested.

Nayeli Lira Gomez

Dallas, Tx.; 469-740-9662; Nayeli.lira123@gmail.com

www.linkedin.com/in/nayeli-lira-gomez

EDUCATION

The University of Texas at Dallas

May 2024

Bachelor of Science in Finance with a Concentration in Real Estate Management

Eastfield College, Mesquite, Tx.

May 2020

Associate of Science, General Science Studies

GPA 3.50

PROFESSIONAL EXPERIENCE

Charles Schwab, Westlake, TX.

September 2023 – April 2024

Investor Services Intern

- Engaged with 30+ Schwab clients per day resolving their concerns
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Lingerie Department Manager

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February 2019 – January 2022

Assistant Store Manager

- Oversaw store operations ensuring compliance and responsible for \$7K+ store sales cash deposits daily
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Pharmacy and Surgical Supplies, Dallas, TX.

May 2019 – August 2019

Pharmacy Technician

- Dispensed medication for 50+ prescriptions per day with 100% accuracy
- Prepared and placed labels on bottles and vials, called patients, and organized delivery routes

Trust Group Inc., Farmers Branch, TX.

August 2017 – June 2018

Recruiting Assistant Intern

- Audited 75+ resumes on recruiting websites for possible candidates while assisting with general administration

ADDITIONAL INFORMATION

Technical Skills: Microsoft Excel, Word, SQL, Tableau, ARGUS

Certification: Life and Health Insurance License

Languages: Fluent in Spanish

Eligibility: US Citizen, Eligible to work in the US with no restrictions

Oksana Park

McKinney, TX; (347) 619-4311; Oksana.Park@utdallas.edu
www.linkedin.com/in/oksana-park

EDUCATION

The University of Texas at Dallas

Expected: 12/2023 *B.S., Finance*

Honors

GPA 3.83

Deans List

Borough of Manhattan Community College

12/2020 *A.S., Financial Management*

Honors

GPA 3.934

Phi Theta Kappa Society, Deans List

BUSINESS EXPERIENCE

Bank OZK- Real Estate Specialties Group

06/2023 – 08/2023

Summer Intern- Asset Management

- Reviewed newly approved lending facilities, including analysis of property operations, historical and projected revenues and operating, leasing and capital expenditures with respect to the ongoing economic viability of the property and loan
- Evaluated monthly loan draws to ensure compliance with budget, assessing ongoing construction risk and ordering and reviewing title updates
- Reviewed and interpreted loan payoffs and releases of collateral
- Assessed lease agreements, sales contracts and other legal documents related to the loan portfolio
- Interpreted borrower/guarantor financial condition and compliance with loan and guaranty covenants, including reviewing and analyzing tax returns and financial statements.

Capital One Bank, Dallas, TX

11/2019 – 11/2022

Branch Ambassador

- Answered all requests of customers and created solutions for any issues which resulted in 97% customer satisfaction
- Assessed 15 personal and 4 business accounts weekly
- Educated 10-15 customers daily about banking channels
- Ensured customers meet their financial needs by providing 100% customer service
- Performed a teller's duties while having less than 1% errors
- Resolved customers issues with 100% customer satisfaction

ACADEMIC PROJECT EXPERIENCE

- Marketing Plan for PISD Education Foundation 08/2023-11/2023
- Analyzed a significant event in the financial market during the subprime crisis of 2008-2009 02/2023
- Industry champion of The Business Strategy Game 09/2021-12/2021

PROFESSIONAL AFFILIATIONS

Future Business Leaders of America-Phi Beta Lambda, University of Texas at Dallas

09/2022 – Present

Financial Leadership Association, University of Texas at Dallas

09/2022 – Present

TECHNICAL SKILLS

Languages: Bilingual in Ukrainian and Russian

Advanced in English

Basic in Spanish and French

Tools: Microsoft Office, MRI Argus, Tableau Software, Maple Soft Product System, R System

FINANCIAL ANALYST

Permanent Jobs



**Herbert D. Weitzman
Institute for Real Estate**

Divyesh Asmani

Dallas, Tx, 75252 | +1 (760) 927 2681 | Divyesh.Asmani@utdallas.edu | <https://www.linkedin.com/in/divyesh-asmani>

EDUCATION

Master of Science in Finance | The University of Texas at Dallas, Texas | May 24 | **GPA 3.67**

Bachelor of Engineering in Instrumentation & Control | Gujarat Technological University | June 21 | **GPA 3.40**

TECHNICAL SKILLS

Certifications: Mutual Fund Distributor – VA, Bloomberg Market Concepts (BMC), FactSet

Programming: R Programming, Python, SQL

Software: ARGUS modeling, MS Excel, PowerPoint, Word, PowerBi, Outlook, Tableau, Tome Ai, ChatGPT (prompts).

Databases: FactSet, Crunchbase, Refinitiv Workspace, Capital IQ, Bloomberg

ADDITIONAL

Languages: English, Hindi, Gujarati

Eligibility: Eligible to work in the US for internships and full-time for up to 36 months on F1 Student Visa under the STEM. I

possess a valid driving license and SSN

PROFESSIONAL EXPERIENCE

Teaching Assistant | The University of Texas at Dallas, Tx

Aug 23 – Present

- Assisted Dr. Hirofumi Nishi in Financial Management and Prof. Julie Lynch in three Real Estate courses, serving **150 students**.
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Dec 22 – Aug 23

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- Analyzed and ensured compliance for **35,000 transactions totaling \$7M**, using tools such as Excel, PowerPoint, and SQL Query for detailed reporting. Extensively used Excel Functions like Vlookup, Data Tables, Pivot Tables, optimization, and Macros.
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- Created a visual dashboard for “Employee Satisfaction” to reduce Attrition at the **Tableau** boot camp at UTD organized by Envision Club, **Sept 2023**

COMPETITIONS & LEADERSHIP EXPERIENCE

- Awarded Best Intern award at Experts-hub Training & Internship program for completing the project and leading a team of 10 participants at Savitribai Phule University, Pune
- International Society for Automation, Student Chapter SARVA, Treasurer from Aug 2019 to Feb 2021
- Secured 1st position in Entrepreneurship Project Awareness Camp organized by EDC cell, SCET, GTU
- Elected as a Class Representative for the freshmen year in the academic year 2017-2018

MADHUR SUNIL CHAUDHARI

Richardson, TX, 75080; 945-257-5742; madhur.c6@gmail.com LinkedIn: <https://in.linkedin.com/in/madhurchaudhari>

EDUCATION

The University of Texas at Dallas (UTD)

Master of Science, Finance

Herbert D. Weitzman Real Estate Fellowship recipient

December 2024

GPA- 3.7

Institute of Chartered Accountants of India (ICAI)

Chartered Accountant, Accounting and Finance

January 2017

Savitribai Phule Pune University

Bachelor of Commerce, Statistics

April 2014

PROFESSIONAL EXPERIENCE

University of Texas at Dallas

Graduate Teaching Assistant – Financial Management course

May 2023- Present

- Educated 20+ students in Financial Management focusing on assignments and projects boosting “A” grades by 15 students.
- Planned, budgeted, and hosted events like case competitions, lab workshops, and guest lectures with an attendance of 80+.
- Formulated on various financial modeling valuation assignments, real estate market studies, and report writing.

CRISIL Global Research and Risk Solutions

Senior Risk Analyst – Wholesale Lending Quality Assurance (QA)

March 2022- December 2022

- Revamped quality assurance process in Wholesale Lending for MNC bank leading to a 40% surge in operational efficiency.
- Trained and mentored a proficient team of 10+ assurance officers, adeptly overseeing script testing across business functions.
- Analyzed data, shared results with business leaders, and cut policy deviations by 28%.
- Acknowledged with an 'Excellence Award' for exceptional work in risk advisory, team leadership, integrity, and accountability.

MNM Wealth Management

Co-Founder

January 2021- March 2022

- Conducted marketing campaigns, nurtured leads, and boosted asset growth by 190% through sales and cross-sales of products.
- Researched potential investment areas and prepared tailor-made plans to satisfy the investment needs of the clients.
- Conducted webinars and information sessions in small corporations to educate about various saving instruments in capital markets.
- Mentored a team of 2 analysts to lay out sales and operations processes from lead generation to onboarding clients.

Bajaj Housing Finance Limited

Credit Analyst- Wholesale Lending (Residential & Commercial Real Estate Financing)

December 2017- January 2021

- Provided strategic planning on the formulation of real estate funding transactions to residential and commercial real estate builders.
 - Credit Underwriting and transaction advisory in more than 50 real estate deals with a cumulative value of more than USD 1250 M.
 - Engaged with customers to understand project execution and business strategy to advise the most suitable debt-equity structure.
 - Pitched appraisals to top management, articulating the outcome of in-depth financial due diligence, financial analysis, ratio analysis, cash flow models, and market analysis using tools like Microsoft Excel, Word, and PowerPoint.
 - Thoroughly scrutinized micro markets, financial statements, forecasted sales and cash flow, sensitivity analysis, and analyzed property cost components using Excel models to effectively mitigate credit risk.
 - Rewarded as ‘Sprinter’ and promoted by Bajaj Housing Finance Ltd for simultaneously working on 5 deals.
-

ORGANIZATIONS:

Graduate Finance Management Council, UTD- Treasurer

May 2023 – Present

The Real Estate Club, UTD

January 2023 – Present

COMPETITIONS:

- **Fin-Hack Competition, UTD** : Secured **3rd place** in Fin-Hack organized by the Finance Lab, UTD in March of 2023.
 - **Excel Financial Modeling, UTD** : Secured **2nd place** in Excel modeling organized by the GFMC, UTD in April of 2023.
-

CERTIFICATIONS: CFA Level 1, Costar, Bloomberg, FactSet, Refinitiv

SOFTWARE: Eikon Datastream, SDS Platinum, Microsoft Excel, Tableau, Capital IQ

ADDITIONAL INFORMATION:

- **Languages:** English, Hindi, Marathi
- **Eligibility:** Eligible to work in the U.S. for internships and for full-time employment for up to 36 months without sponsorship.

Jonathan Garcia

Nevada, Tx, 75173; (214) 710-9195; jonathangar2354@gmail.com
www.linkedin.com/in/jonathangarcia2354

EDUCATION EXPERIENCE

The University of Texas at Dallas

Bachelor of Finance, Concentration in Real Estate
Academic Excellence Scholarship Recipient

May 2024

Richland College, Dallas, Tx

Associate of Science, Finance, Collegiate High School Student

May 2021

PROFESSIONAL EXPERIENCE

Wood Flooring Contractor, DFW Metroplex

January 2016 – Present

- Generated 15 cost estimates per month, resulting in an average of 12 projects scheduled
- Operate, clean, and maintain flooring installation equipment and tools
- Interact with 15+ clients per day in either Spanish or English extending sales reach
- Assess strengths and weaknesses weekly with a plan to improve for the following week

Metal Construction Material Salesman, from home

March 2023 – Present

- Discuss customer needs for construction material according to projects resulting in both company and consumer benefit
- Generated more than \$80,000 in sales of metal construction material in a span of less than 6 months
- Retain contact with almost 100% of customers to promote strong-prolonged connections for future business with repeated buys from customers from the start
- Promote products using social media to gain reach and expand to local and surrounding markets
- Master the use of Facebook Marketplace, as well as Instagram and TikTok sales generating more than 75% of total sales

Marketing Representative for Currency Trading Platform, Remote

January 2021 – January 2023

- Assessed client needs to determine markets to invest with over 88% satisfaction rate
- Researched foreign exchange financial markets to determine where the market is and where the market is going
- Advised of particular currencies/investments based on market trends to get more than 8% returns for customers
- Developed strategies to capitalize on emerging opportunities within the currency market all while staying within the plan
- Advised over 65 people and led teams towards success within the marketing side of the education platform

ORGANIZATIONS AND LEADERSHIP EXPERIENCE

Social Impact Marketing Fundraising Project, UT Dallas, Project Leader

August 2023 – December 2023

- Maintain effective communication within group to promote teamwork
- Schedule necessary and supplementary meetings for work completion
- Communicate with project sponsors to maintain an understanding of project scope and direction of the project
- Execute plans with confidence but with flexibility to adapt to any possible changes

Catholic Charities of Dallas, Application Processing Assistant

August 2019 – August 2021

- Demonstrated competence with Excel to input client information
- Collaborated with event sponsors and managers to run events
- Analyzed data to then interpret trends/patterns within the community

TECHNICAL SKILLS

Certifications: MS Office Specialist for Excel

Software Tools: MS Excel, MS Word, MS Powerpoint

Other: Computer Troubleshooting expertise

ADDITIONAL INFORMATION

Languages: Fluent in Spanish

Eligibility: US Citizen, Eligible to work in the US for internships and full time with no restrictions

Christopher Gilmore

214-815-8984 | christopher.gilmore98@gmail.com | [linkedin.com/in/cgilmore98](https://www.linkedin.com/in/cgilmore98)

Education

Bachelor of Science, Finance – Real Estate Concentration

December 2023 GPA 3.5

Comet Transfer Scholarship

The University of Texas at Dallas

Certifications & Technical Skills

Operation Systems: Windows | QuickBooks | UTD Argus Course Completion | CoStar | Project Destined Financial Modeling Certification

Technical: MS Office | SharePoint | Workday | Excel | Word

Relevant Course Work

Real Estate Principles | Real Estate Finance & Principles | Investment Management | Real Estate Law & Contracts | Real Estate Valuation

Experience

Project Destined

September 2023 – October 2023

Research Analyst Internship

- Collaborated with a team of 8 for market research, property analysis, valuation, and deal financing.
- Completed Financial Modeling Certification led by Graduate School professors at NYU/Associate at Brookfield Properties.
- Prepared and presented investment memo to professionals from Brookfield Properties.

State Farm Corporate Office

May 2023 – August 2023

P&C Underwriting Internship

- Researched and developed recommendations for enhancing State Farm and their future role strategies and future technology.
- Developed and implemented templates to monitor daily task touchpoints, enabling identification of gaps in underwriters' handling and process efficiency.
- Collaborated with peer interns to analyze productivity at home compared to that in the office for production employees.

State Farm Corporate Office

May 2022 - August 2022

P&C Claims Internship

- Resolved payment discrepancies and ensured payments were issued promptly to appropriate parties.
- Cooperated with accounting to reconcile accounts to ensure consistency throughout multiple customer accounts.
- Reviewed estimates received from partners or non-partners to ensure costs aligned with the loss.

Projects

Luna Blanca

September 2023 – October 2023

- Researched and presented a property analysis, valuation, and deal financing of an existing property near the Bishop Arts District.

AI and the Impact on Future Role Strategy

May 2023 - August 2023

- Researched and presented to Team Managers and the Vice President of Operations of Richardson/Dallas the impacts of AI in the Property & Casualty Insurance space, the impact these will have on State Farm, and future roles.

Impact of Inflation to State Farm

July 2022 - August 2022

- Researched the impact of inflation on State Farm products and presented ideas on how to mitigate the effects by reducing costs to several Team Managers and the Vice President of Operations of Richardson/Dallas.

Investment Management Project

April 2022 - May 2022

- Analyzed historical data of 11 stocks from the S&P 500 to make predictions of their performance and constructed portfolios with different risk tolerances, where \$5,000 dollars were invested.

Nayeli Lira Gomez

Dallas, Tx.; 469-740-9662; Nayeli.lira123@gmail.com

www.linkedin.com/in/nayeli-lira-gomez

EDUCATION

The University of Texas at Dallas

May 2024

Bachelor of Science in Finance with a Concentration in Real Estate Management

Eastfield College, Mesquite, Tx.

May 2020

Associate of Science, General Science Studies

GPA 3.50

PROFESSIONAL EXPERIENCE

Charles Schwab, Westlake, TX.

September 2023 – April 2024

Investor Services Intern

- Engaged with 30+ Schwab clients per day resolving their concerns
- Collaborated with team of 5 outlining recommendations for workplace efficiency and presenting recommendation to executive leadership
- Shadowed and engaged in 10+ senior management meetings with Director documenting and addressing all concerns outlined

Dillards, Garland, TX.

April 2022 – August 2022

Lingerie Department Manager

- Led department team of 6 outlining sales goals daily in morning meetings ensuring goals were met or exceeded
- Informed team of new department practices leading to increased sales performance
- Maintained the department floor merchandised and updated to current trends increasing monthly sales by 15%
- Implemented departmental breast cancer fundraising events resulting in 90% increase in monthly sales

Forever 21, Mesquite, TX.

February 2019 – January 2022

Assistant Store Manager

- Oversaw store operations ensuring compliance and responsible for \$7K+ store sales cash deposits daily
- Led team of 35-50: created schedules, ordered supplies, sorted shipments, and communicated updates on store
- Trained 45 newly recruited and current team member resulting in a 2% turnover rate
- Oversaw weekly payroll of \$10,000 for 35-50 employees
- Analyzed daily sales against target implementing strategies to avoid sales decrease resulting in average of 30% monthly revenue increase

Pharmacy and Surgical Supplies, Dallas, TX.

May 2019 – August 2019

Pharmacy Technician

- Dispensed medication for 50+ prescriptions per day with 100% accuracy
- Prepared and placed labels on bottles and vials, called patients, and organized delivery routes

Trust Group Inc., Farmers Branch, TX.

August 2017 – June 2018

Recruiting Assistant Intern

- Audited 75+ resumes on recruiting websites for possible candidates while assisting with general administration

ADDITIONAL INFORMATION

Technical Skills: Microsoft Excel, Word, SQL, Tableau, ARGUS

Certification: Life and Health Insurance License

Languages: Fluent in Spanish

Eligibility: US Citizen, Eligible to work in the US with no restrictions

Brett Huff

Plano, Tx, 75075; 817-600-1762; brettjet222@gmail.com
https://www.linkedin.com/in/brett-huff-66b97b21b/

Objective

Highly coachable, passionate, and self-motivated college student seeking permanent job opportunity in Finance, Sales and Real Estate upon graduation.

EDUCATION

The University of Texas at Dallas

Bachelor of Finance, Minor: Sales/Real Estate

Honors/Scholarship(s)- Phi Theta Kappa, Comet Transfer Scholarship, Academic All-ASC

May 2024

GPA 3.3

Hill College Associates Degree – Hillsboro, Tx

Associate of Business Administration

Honors/ Scholarship(s)- NSLS Member, Dean’s List, Full Athletic Scholarship

May 2021

GPA 3.96

PROFESSIONAL EXPERIENCE

MHC Kenworth – Dallas, Tx

May 2023 – August 2023

Operations and Management Intern

- Closed deals up to \$70,000 and managed monthly financial statements for operations
- Communicated to large clients including Amazon in a fast paced environment efficiently and effectively
- Proactively managed logistics and customer accounts with service and parts
- Shadowed management through audits and employee complications

UTD Sales Program

August 2021 – December 2022

Sales Development Representative

- Achieved 460% of quota finishing 2nd in a program of 150 students
- Demonstrated mastery over Salesforce, LinkedIn Sales Navigator, Chorus.AI, XIQ and Xvoyant
- Skills Include: Digital Prospecting, Live Selling, Account Management

Lawson Event Rentals, Richardson, Tx

August 2021 – December 2022

Event Assistant

- Contributed to activities involved with setting up weddings and other major events
- Help clients achieve their very personal and meaningful vision for their event
- Work the late night shifts during school days and weekends

LEADERSHIP EXPERIENCE

Team Captain, Liberty Christian Baseball

August 2019 – May 2019

- Voted a team Captain by my peers’ Senior year
- Lead the team to State Championship titles in 2018 and 2019
- Implemented a culture of accountability and equality

Member, Leadership Training Academy

August 2018 – May 2019

- Mentored elementary school kids and provided advice on their unique issues
- Coached and taught elementary school kids reading and math skills

ORGANIZATIONS

Waterfall Academy – Volunteer

September 2021 – Present

- Supervise special needs kids in both academic and athletic areas

Athlete, Hill College and UT Dallas – Player

August 2021 – Present

- Contributed to a team that Won the ASC Conference Championship

Real Estate Club, UT Dallas – Member

August 2022 – Present

- Actively involved in club meetings, events, and discussions

ADDITIONAL INFORMATION

Technical: [ARGUS Enterprise, Microsoft Excel/Word/Powerpoint, LucidChart, Salesforce, Chorus.AI]

Valuable Classes: ITSS 3300 (Information Technology), FIN 3320 (Corporate Finance), MKT 4332 (Professional Sales)

Jacqueline Igbokwe

Dallas, TX; 75243; 703-798-1003; JXI220003@UTDALLAS.EDU

www.linkedin.com/in/jacqueline-igbokwe-MBA

EDUCATION EXPERIENCE

The University of Texas at Dallas

December 2023

Master of Business Administration, Real Estate

Virginia Commonwealth University

May 2016

Bachelor of Science, Finance, Risk Management & Insurance

PROFESSIONAL EXPERIENCE

Real Estate Investor, Richmond, Virginia

December 2014 – Present

Owner/Operator

- Crafted property strategies targeting an 8% ROI, leveraging insights from market trends, tax shifts, and local developments.
- Oversaw a \$57,000 annual rental revenue, seamlessly integrating lease contracts, financials, budget forecasts, and maintenance records.
- Achieved 100% occupancy through strategic promotions, ensuring reliable tenancy and mitigating rental risks.

CBRE Investment Management, New York, New York

June 2023 – August 2023

Research Analyst - Summer Associate

- Performed in-depth market analysis and crafted asset reports for properties valued at a minimum of \$5 million, leveraging statistical and econometric methodologies for both managed assets and potential acquisitions.
- Employed a mix of quantitative and qualitative techniques to collect, assess, and forecast economic and real estate data, deriving meaningful insights and actionable market trends to guide strategic decision-making.
- Collaborated on a cross-functional team initiative aiming at the integration of AI technologies across the organization, enhancing operational productivity and elevating employee experience.
- Designed and delivered comprehensive reports and presentations, capturing the latest economic shifts, policy alterations, and market dynamics, ensuring stakeholders were equipped with pertinent and up-to-date insights.

Verus Specialty Insurance(a W.R. Berkley Company), Glen Allen, Virginia

October 2019 – September 2021

Assistant Underwriter

- Utilized proprietary underwriting software and industry knowledge to drive a monthly minimum of \$30,000 in new business premiums.
- Conducted onsite visits and analyzed client inspection reports, prior audits, and endorsements to identify and mitigate potential financial loss due to non-risk acceptability adherence.
- Developed long-term relationships with over 35 agents and brokers via ongoing networking activities.

LendUp, North Chesterfield, Virginia

June 2016 – July 2019

Senior Account Manager - Outbound Loan Loss Management

- Provided leadership and supervision to a team of 10 Account Managers, resulting in a monthly average of \$35,000 loan loss recovery per agent.
- Increased monthly loss recovery by 34% by analyzing data to identify trends and develop process improvements.
- Conducted monthly audits to ensure compliance with federal, state, and regulatory requirements.

Software Experience

- ARGUS
- Microsoft Excel
- Microsoft Powerpoint

PROFESSIONAL & ACADEMIC ORGANIZATION MEMBERSHIP

National Association of Women MBAs, The University of Texas at Dallas - Vice President

May 2022 - Present

The Real Estate Club, The University of Texas at Dallas

August 2022 - Present

The Real Estate Council(TREC)

September 2022 - Present

Eligibility: US Citizen, eligible to work in the US with no restrictions.

Mohamed Adam Landolsi

Richardson, TX, 75080; 469-924-7007; mlandolsi99@hotmail.com
www.linkedin.com/in/m-adam-landolsi-b99393aa

EDUCATION

The University of Texas at Dallas December 2024
Master of Science in Finance (MS FIN), Finance **GPA 3.80**

Concordia University – John Molson School of Business, Canada December 2021
Bachelor of Commerce, Finance **GPA 3.50**

The American University of Sharjah, United Arab Emirates May 2019
Bachelors in Business Administration, Finance **GPA 3.80**
Dean's and Chancellor's list two years in a row

PROFESSIONAL EXPERIENCE

LP Analyst, Dallas, Texas October 2022 – Current
Private Equity Analyst

- Organizing and evaluating more than 100 Private Equity, Venture Capital, Real Estate, Real Asset, Infrastructure and Credit strategies that helped enhanced clients' overall decision making.
- Analyzing and structuring private asset fund financial data, including performance, underlying investment, and cash flow details of funds with more than 100B AuM
- Coordinating with private asset managers to collect relevant data and assisted in developing a new tracking system that increased data collection by 20%

ESB LLC., France (Paris) June 2017 – August 2017
Summer Intern

- Acquired construction and renovation materials and delivered them on-site in a timely manner to teams working on the renovation of on-site restaurants.
- Collaborated with the management team with clerical tasks such as filling out order checks, coordinating payments with suppliers, and following up with delivery.
- Developed a business proposal that improved business operations and increased efficiency by 135%.

ACADEMIC PROJECT EXPERIENCE

Technical Analysis Project, Concordia University – FINA 408 January 2021– April 2021

- Developed and back tested a trading system using both technical and fundamental analysis.
- Used TradingView's Pine Script language to develop the non-discretionary trading system that enhanced returns by over 25%.

Investment Analysis Project, Concordia University – FINA 410

- Valued two Canadian recreational vehicle companies and provided investment thesis using the DCF model based on more than 10 comparable company valuations.
- Forecasted the 3-financial statements for the two companies and developed projections for performance over a 5-year horizon.

VOLUNTEER ORGANIZATIONS

Friends of Cancer Patients, Volunteer January 2018 – March 2018
IWAS Special Olympics, Activities Coordinator and Volunteer January 2018 – March 2018

ADDITIONAL INFORMATION

Skills: Excel, PowerPoint, MySQL, Python, RStudio

Languages: French, English, Arabic

Eligibility: US Citizen, Eligible to work in the US for internships and full time with no restrictions.

MATTHEW LORENTZ

Matthew.Lorentz@utdallas.edu • (713) 360-8943 • LinkedIn.com/in/matthewlorentz/

EDUCATION

The University of Texas at Dallas Bachelor of Science, Finance May 2024
Concentration in Real Estate GPA: 3.82/4.00

EXPERIENCE

Central Metro Realty - Licensed Realtor; Dallas, TX May 2021 - Present

- Utilized the 3 real estate valuation techniques to conduct market research and ensure precise property assessments
- Facilitated the closure of a residential real estate transaction exceeding \$1,000,000

Capital Factory - Venture Fellow; Dallas, TX January 2021 - June 2021

- Evaluated 5 startups across the technology and food products industries using qualitative (SWOT, Porter's Five Forces) and financial analysis to determine viability for investment
- Performed data analysis on 300+ portfolio companies to compare the fund's performance to benchmarks
- Presented results and recommendations from the data analysis to CEO

Lindale Partners - Private Equity Intern; Dallas, TX June 2020 - July 2020

- Analyzed the financials and information memorandums of potential acquisition targets with EBITDA up to \$10M
- Created 3 investment recommendation reports to present to the firm's senior partner

Prime Natural Resources - Private Equity Intern; Houston, TX March 2020 - June 2020

- Conducted research on 2 public companies, compiled all findings into slide decks, and presented the results to the investment team
- Provided a high-level overview of business segment and industry performance during the COVID-19 pandemic

ACADEMIC PROJECTS

UT Dallas Seed Fund - Student Venture Capital Associate Fall 2021

- Collaborated with 6 other students to source, perform due diligence, create investment memorandums, and ultimately recommend a UT-Dallas affiliated startup for \$100k in grant funding
- Developed an evaluation matrix used to conduct due diligence on 20+ startups

LEADERSHIP EXPERIENCE AND ACTIVITIES

Students Promoting Acts of Random Kindness - Treasurer Spring 2022 - Present

- Streamlined the organization's semesterly funding process using Qualtrics
- Constructed annual fiscal reports and coordinated monetary decisions in accordance with university policies

Professional Program in Finance (PPF) - 5th Cohort Member Fall 2021 - Present

- Selected as 1 of 40 finance students (100+ applicants) for a competitive university program
- Completed the PPF financial modelling training course designed to enhance technical skills for a career in finance

Entrepreneurship Club - Treasurer Fall 2020 - Summer 2021

- Organized meetings and events with the goal of connecting DFW based startups to university students
- Created a formal sponsorship packet outlining club-offered benefit packages, resulting in a 200% increase in sponsorships
- Facilitated a \$1,500 budget plan and tracked monthly spending for events and ventures

ADDITIONAL INFORMATION

Computer Skills: Asana, HubSpot, Capital IQ, MS Excel (Pivot Tables, VLOOKUP), Word, PowerPoint

Certifications: Real Estate Agent License (2021 - Present), Bloomberg Market Concepts (2020)

Interests/Hobbies: Basketball, Chess, Fishing, Gaming, Traveling, Meditation

Work Eligibility: Eligible to work in the United States without restrictions

Sai Sunkara

(pronounced "Sigh")

Dallas, TX - cell: 469.536.5039 - saitejasunkara008@gmail.com - <http://www.linkedin.com/in/saitejasunkara3>

OBJECTIVE: To secure a real estate Financial Analyst position that enables me to perform financial modeling, valuation, market research, development, and risk management.

CERTIFICATIONS: LEED Green Associate, Certified Associate in Project Management

EDUCATION

The University of Texas at Dallas, **M.S. Finance, Concentration in Real Estate** * Fellowship Awardee **December 2023**

* Introduction to Real Estate

* Real Estate Finance and Investments

* Real Estate Market Analysis and Investments

* Technologies: ARGUS Enterprise, CoStar and Yardi

Amity University Maharashtra **August 2019**

MBA, Construction Project Management, First Division with Distinction, Best All-Round Student Award, Bronze Medal

Jawaharlal Nehru Technological University Anantapur **May 2017**

B.Tech., Civil Engineering, First Class with Distinction

BUSINESS EXPERIENCE

Bridge Investment Group, Salt Lake City, United States of America **May 2023 – August 2023**

Summer Development Analyst - Qualified Opportunity Zones

- Assisting the senior analyst and director in updating cost reports, contract trackers, budget forecasts, and asset summary reports for a portfolio of 80+ projects and creating a project stakeholder database consisting of 400+ entities.
- Reviewed due diligence reports, budgets, change orders, draws, and project schedules for multifamily ground-up projects. Increased my proficiency in underwriting models and CoStar by interacting with analysts.

Cushman & Wakefield India Private Limited **August 2021 – July 2022**

Project Coordinator – Office Fit-Out Projects

- Reviewed billings worth of \$5 million and saved \$0.3 million by providing design advisory.
- Led a team of 25+ contractors during construction to allocate weekly activities by creating weekly look ahead plans, trackers and checklist, improving labor productivity by 5%. Reviewed and validated change orders.

CBRE South Asia Private Limited **June 2019 – January 2021**

Project Coordinator – Ground-up Office Development

- Managed project documentation, coordination and improved document retrieving and team collaboration by 15%. Orchestrated all project meetings by setting agendas and publishing minutes.
- Assisted regional audit manager during safety and quality audits and prepared various management reports.

LEADERSHIP EXPERIENCE AND ORGANIZATIONS

Real Estate Club at UTD – Board Member **Dec 2022 – Present**

NTCAR Student Member **Dec 2022 – Present**

U.S. Green Building Council Student Volunteer, Amity University **November 2018 – November 2018**

ADDITIONAL INFORMATION

Athletics: Won Intra University Cricket Championship, Amity University, October 2018

Languages: English, Telugu, Hindi

Eligibility: Eligible to work in the US for internships and full time for up to 36 months without sponsorship

REFERENCE Jim Trythall, Managing Director, Bridge Investment Group. 435.851.0211

Julie Lynch, Director, Weitzman Institute for Real Estate at The University of Texas at Dallas. 214.883.4721

MARKETING

Permanent Jobs



**Herbert D. Weitzman
Institute for Real Estate**

MADHUR SUNIL CHAUDHARI

Richardson, TX, 75080; 945-257-5742; madhur.c6@gmail.com LinkedIn: <https://in.linkedin.com/in/madhurchaudhari>

EDUCATION

The University of Texas at Dallas (UTD)

Master of Science, Finance

Herbert D. Weitzman Real Estate Fellowship recipient

December 2024

GPA- 3.7

Institute of Chartered Accountants of India (ICAI)

Chartered Accountant, Accounting and Finance

January 2017

Savitribai Phule Pune University

Bachelor of Commerce, Statistics

April 2014

PROFESSIONAL EXPERIENCE

University of Texas at Dallas

Graduate Teaching Assistant – Financial Management course

May 2023- Present

- Educated 20+ students in Financial Management focusing on assignments and projects boosting “A” grades by 15 students.
- Planned, budgeted, and hosted events like case competitions, lab workshops, and guest lectures with an attendance of 80+.
- Formulated on various financial modeling valuation assignments, real estate market studies, and report writing.

CRISIL Global Research and Risk Solutions

Senior Risk Analyst – Wholesale Lending Quality Assurance (QA)

March 2022- December 2022

- Revamped quality assurance process in Wholesale Lending for MNC bank leading to a 40% surge in operational efficiency.
- Trained and mentored a proficient team of 10+ assurance officers, adeptly overseeing script testing across business functions.
- Analyzed data, shared results with business leaders, and cut policy deviations by 28%.
- Acknowledged with an 'Excellence Award' for exceptional work in risk advisory, team leadership, integrity, and accountability.

MNM Wealth Management

Co-Founder

January 2021- March 2022

- Conducted marketing campaigns, nurtured leads, and boosted asset growth by 190% through sales and cross-sales of products.
- Researched potential investment areas and prepared tailor-made plans to satisfy the investment needs of the clients.
- Conducted webinars and information sessions in small corporations to educate about various saving instruments in capital markets.
- Mentored a team of 2 analysts to lay out sales and operations processes from lead generation to onboarding clients.

Bajaj Housing Finance Limited

Credit Analyst- Wholesale Lending (Residential & Commercial Real Estate Financing)

December 2017- January 2021

- Provided strategic planning on the formulation of real estate funding transactions to residential and commercial real estate builders.
 - Credit Underwriting and transaction advisory in more than 50 real estate deals with a cumulative value of more than USD 1250 M.
 - Engaged with customers to understand project execution and business strategy to advise the most suitable debt-equity structure.
 - Pitched appraisals to top management, articulating the outcome of in-depth financial due diligence, financial analysis, ratio analysis, cash flow models, and market analysis using tools like Microsoft Excel, Word, and PowerPoint.
 - Thoroughly scrutinized micro markets, financial statements, forecasted sales and cash flow, sensitivity analysis, and analyzed property cost components using Excel models to effectively mitigate credit risk.
 - Rewarded as ‘Sprinter’ and promoted by Bajaj Housing Finance Ltd for simultaneously working on 5 deals.
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ORGANIZATIONS:

Graduate Finance Management Council, UTD- Treasurer

May 2023 – Present

The Real Estate Club, UTD

January 2023 – Present

COMPETITIONS:

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 - **Excel Financial Modeling, UTD** : Secured **2nd place** in Excel modeling organized by the GFMC, UTD in April of 2023.
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CERTIFICATIONS: CFA Level 1, Costar, Bloomberg, FactSet, Refinitiv

SOFTWARE: Eikon Datastream, SDS Platinum, Microsoft Excel, Tableau, Capital IQ

ADDITIONAL INFORMATION:

- **Languages:** English, Hindi, Marathi
- **Eligibility:** Eligible to work in the U.S. for internships and for full-time employment for up to 36 months without sponsorship.

Jonathan Garcia

Nevada, Tx, 75173; (214) 710-9195; jonathangar2354@gmail.com
www.linkedin.com/in/jonathangarcia2354

EDUCATION EXPERIENCE

The University of Texas at Dallas

Bachelor of Finance, Concentration in Real Estate
Academic Excellence Scholarship Recipient

May 2024

Richland College, Dallas, Tx

Associate of Science, Finance, Collegiate High School Student

May 2021

PROFESSIONAL EXPERIENCE

Wood Flooring Contractor, DFW Metroplex

January 2016 – Present

- Generated 15 cost estimates per month, resulting in an average of 12 projects scheduled
- Operate, clean, and maintain flooring installation equipment and tools
- Interact with 15+ clients per day in either Spanish or English extending sales reach
- Assess strengths and weaknesses weekly with a plan to improve for the following week

Metal Construction Material Salesman, from home

March 2023 – Present

- Discuss customer needs for construction material according to projects resulting in both company and consumer benefit
- Generated more than \$80,000 in sales of metal construction material in a span of less than 6 months
- Retain contact will almost 100% of customers to promote strong-prolonged connections for future business with repeated buys from customers from the start
- Promote products using social media to gain reach and expand to local and surrounding markets
- Master the use of Facebook Marketplace, as well as Instagram and TikTok sales generating more than 75% of total sales

Marketing Representative for Currency Trading Platform, Remote

January 2021 – January 2023

- Assessed client needs to determine markets to invest with over 88% satisfaction rate
- Researched foreign exchange financial markets to determine where the market is and where the market is going
- Advised of particular currencies/investments based on market trends to get more than 8% returns for customers
- Developed strategies to capitalize on emerging opportunities within the currency market all while staying within the plan
- Advised over 65 people and led teams towards success within the marketing side of the education platform

ORGANIZATIONS AND LEADERSHIP EXPERIENCE

Social Impact Marketing Fundraising Project, UT Dallas, Project Leader

August 2023 – December 2023

- Maintain effective communication within group to promote teamwork
- Schedule necessary and supplementary meetings for work completion
- Communicate with project sponsors to maintain an understanding of project scope and direction of the project
- Execute plans with confidence but with flexibility to adapt to any possible changes

Catholic Charities of Dallas, Application Processing Assistant

August 2019 – August 2021

- Demonstrated competence with Excel to input client information
- Collaborated with event sponsors and managers to run events
- Analyzed data to then interpret trends/patterns within the community

TECHNICAL SKILLS

Certifications: MS Office Specialist for Excel

Software Tools: MS Excel, MS Word, MS Powerpoint

Other: Computer Troubleshooting expertise

ADDITIONAL INFORMATION

Languages: Fluent in Spanish

Eligibility: US Citizen, Eligible to work in the US for internships and full time with no restrictions

Christopher Gilmore

214-815-8984 | christopher.gilmore98@gmail.com | [linkedin.com/in/cgilmore98](https://www.linkedin.com/in/cgilmore98)

Education

Bachelor of Science, Finance – Real Estate Concentration

December 2023 GPA 3.5

Comet Transfer Scholarship

The University of Texas at Dallas

Certifications & Technical Skills

Operation Systems: Windows | QuickBooks | UTD Argus Course Completion | CoStar | Project Destined Financial Modeling Certification

Technical: MS Office | SharePoint | Workday | Excel | Word

Relevant Course Work

Real Estate Principles | Real Estate Finance & Principles | Investment Management | Real Estate Law & Contracts | Real Estate Valuation

Experience

Project Destined

September 2023 – October 2023

Research Analyst Internship

- Collaborated with a team of 8 for market research, property analysis, valuation, and deal financing.
- Completed Financial Modeling Certification led by Graduate School professors at NYU/Associate at Brookfield Properties.
- Prepared and presented investment memo to professionals from Brookfield Properties.

State Farm Corporate Office

May 2023 – August 2023

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- Researched and developed recommendations for enhancing State Farm and their future role strategies and future technology.
- Developed and implemented templates to monitor daily task touchpoints, enabling identification of gaps in underwriters' handling and process efficiency.
- Collaborated with peer interns to analyze productivity at home compared to that in the office for production employees.

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May 2022 - August 2022

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- Resolved payment discrepancies and ensured payments were issued promptly to appropriate parties.
- Cooperated with accounting to reconcile accounts to ensure consistency throughout multiple customer accounts.
- Reviewed estimates received from partners or non-partners to ensure costs aligned with the loss.

Projects

Luna Blanca

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- Researched and presented a property analysis, valuation, and deal financing of an existing property near the Bishop Arts District.

AI and the Impact on Future Role Strategy

May 2023 - August 2023

- Researched and presented to Team Managers and the Vice President of Operations of Richardson/Dallas the impacts of AI in the Property & Casualty Insurance space, the impact these will have on State Farm, and future roles.

Impact of Inflation to State Farm

July 2022 - August 2022

- Researched the impact of inflation on State Farm products and presented ideas on how to mitigate the effects by reducing costs to several Team Managers and the Vice President of Operations of Richardson/Dallas.

Investment Management Project

April 2022 - May 2022

- Analyzed historical data of 11 stocks from the S&P 500 to make predictions of their performance and constructed portfolios with different risk tolerances, where \$5,000 dollars were invested.

Nayeli Lira Gomez

Dallas, Tx.; 469-740-9662; Nayeli.lira123@gmail.com

www.linkedin.com/in/nayeli-lira-gomez

EDUCATION

The University of Texas at Dallas

May 2024

Bachelor of Science in Finance with a Concentration in Real Estate Management

Eastfield College, Mesquite, Tx.

May 2020

Associate of Science, General Science Studies

GPA 3.50

PROFESSIONAL EXPERIENCE

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September 2023 – April 2024

Investor Services Intern

- Engaged with 30+ Schwab clients per day resolving their concerns
- Collaborated with team of 5 outlining recommendations for workplace efficiency and presenting recommendation to executive leadership
- Shadowed and engaged in 10+ senior management meetings with Director documenting and addressing all concerns outlined

Dillards, Garland, TX.

April 2022 – August 2022

Lingerie Department Manager

- Led department team of 6 outlining sales goals daily in morning meetings ensuring goals were met or exceeded
- Informed team of new department practices leading to increased sales performance
- Maintained the department floor merchandised and updated to current trends increasing monthly sales by 15%
- Implemented departmental breast cancer fundraising events resulting in 90% increase in monthly sales

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- Oversaw store operations ensuring compliance and responsible for \$7K+ store sales cash deposits daily
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Pharmacy and Surgical Supplies, Dallas, TX.

May 2019 – August 2019

Pharmacy Technician

- Dispensed medication for 50+ prescriptions per day with 100% accuracy
- Prepared and placed labels on bottles and vials, called patients, and organized delivery routes

Trust Group Inc., Farmers Branch, TX.

August 2017 – June 2018

Recruiting Assistant Intern

- Audited 75+ resumes on recruiting websites for possible candidates while assisting with general administration

ADDITIONAL INFORMATION

Technical Skills: Microsoft Excel, Word, SQL, Tableau, ARGUS

Certification: Life and Health Insurance License

Languages: Fluent in Spanish

Eligibility: US Citizen, Eligible to work in the US with no restrictions

MATTHEW LORENTZ

Matthew.Lorentz@utdallas.edu • (713) 360-8943 • LinkedIn.com/in/matthewlorentz/

EDUCATION

The University of Texas at Dallas Bachelor of Science, Finance May 2024
Concentration in Real Estate GPA: 3.82/4.00

EXPERIENCE

Central Metro Realty - Licensed Realtor; Dallas, TX May 2021 - Present

- Utilized the 3 real estate valuation techniques to conduct market research and ensure precise property assessments
- Facilitated the closure of a residential real estate transaction exceeding \$1,000,000

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- Evaluated 5 startups across the technology and food products industries using qualitative (SWOT, Porter's Five Forces) and financial analysis to determine viability for investment
- Performed data analysis on 300+ portfolio companies to compare the fund's performance to benchmarks
- Presented results and recommendations from the data analysis to CEO

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- Analyzed the financials and information memorandums of potential acquisition targets with EBITDA up to \$10M
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- Conducted research on 2 public companies, compiled all findings into slide decks, and presented the results to the investment team
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- Collaborated with 6 other students to source, perform due diligence, create investment memorandums, and ultimately recommend a UT-Dallas affiliated startup for \$100k in grant funding
- Developed an evaluation matrix used to conduct due diligence on 20+ startups

LEADERSHIP EXPERIENCE AND ACTIVITIES

Students Promoting Acts of Random Kindness - Treasurer Spring 2022 - Present

- Streamlined the organization's semesterly funding process using Qualtrics
- Constructed annual fiscal reports and coordinated monetary decisions in accordance with university policies

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- Selected as 1 of 40 finance students (100+ applicants) for a competitive university program
- Completed the PPF financial modelling training course designed to enhance technical skills for a career in finance

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- Organized meetings and events with the goal of connecting DFW based startups to university students
- Created a formal sponsorship packet outlining club-offered benefit packages, resulting in a 200% increase in sponsorships
- Facilitated a \$1,500 budget plan and tracked monthly spending for events and ventures

ADDITIONAL INFORMATION

Computer Skills: Asana, HubSpot, Capital IQ, MS Excel (Pivot Tables, VLOOKUP), Word, PowerPoint

Certifications: Real Estate Agent License (2021 - Present), Bloomberg Market Concepts (2020)

Interests/Hobbies: Basketball, Chess, Fishing, Gaming, Traveling, Meditation

Work Eligibility: Eligible to work in the United States without restrictions

PROPERTY MANAGEMENT

Permanent Jobs



**Herbert D. Weitzman
Institute for Real Estate**

Jamari Taye Bowers

Dallas, Texas; (346)-252-2078; jtdbowers@gmail.com
<https://www.linkedin.com/in/jamaribowers/>

EDUCATION

The University of Texas at Dallas

May 2024

Bachelor of Science, Finance - Real Estate Investment Management Track

PROFESSIONAL EXPERIENCE

PGIM Real Estate

June 2023 – Present

Asset Management Intern

- Processed borrower requests on Prudential's general account for loans valued up to \$250 million.
- Prepared credit action case plan writeups for leasing and SNDA requests.
- Developed impact analysis inclusive of local market conditions, property operating data, and relevant loan provisions for lease consents.
- Maintained communications with borrowers regarding post-closing and other loan obligations.
- Received and processed preliminary lien notices inclusive of communicating with the borrower for a resolution and documenting in Loan Connect.
- Contributed to bi-weekly departmental pipeline meetings to maintain company workflow.

Simisola Holdings LLC

November 2021 – June 2023

Investment Analyst

- Conducted market research on residential properties in the Greater Houston area.
- Analyzed investment opportunities on properties up to \$1 Million in value.
- Organized and presented CMA reports to stakeholders using Microsoft Excel.
- Processed tenant rent roll payments and executed maintenance requests.

HARRIS Manufactured Housing & Commercial Brokerage

March 2022 – September 2022

Research Associate

- Utilized Instant Checkmate and thorough research to gather ownership data of properties valued up to \$20M.
- Conducted cold calls to confirm property and owner contact information.
- Maintained database in ArcGIS to provide current and accurate information for senior associates.

ACADEMIC PROJECTS & RELEVANT COURSEWORK

- Real Estate Valuation (Capstone Course Project) October 2023 – December 2023
 - Utilized market and financial analysis skills to make the best decision for a development project.
 - Collaborated with group members to prepare and present findings and suggestions.
- Real Estate Law and Contracts
- Real Estate Finance and Principles
- Real Estate Markets and Investments
- Commercial Property Risk Management and Insurance

ORGANIZATIONS AND HONORS

Real Estate Club, UTD

August 2020 – Present

Undergraduate Success Scholars, UTD

August 2020 – Present

Black Student Alliance, UTD

August 2022 – Present

Davidson Management Honors Program, UTD

August 2020 – January 2022

ADDITIONAL INFORMATION

Technical Skills: CoStar, Loan Connect, ARGUS, Excel, Microsoft Office, Zoom, Google Suite, ArcGIS, Think-Cell.

Languages: Native English

Eligibility: US Citizen. Eligible to work in the US with no restrictions. Willing to relocate for work.

MADHUR SUNIL CHAUDHARI

Richardson, TX, 75080; 945-257-5742; madhur.c6@gmail.com LinkedIn: <https://in.linkedin.com/in/madhurchaudhari>

EDUCATION

The University of Texas at Dallas (UTD)

Master of Science, Finance

December 2024

GPA- 3.7

Herbert D. Weitzman Real Estate Fellowship recipient

Institute of Chartered Accountants of India (ICAI)

Chartered Accountant, Accounting and Finance

January 2017

Savitribai Phule Pune University

Bachelor of Commerce, Statistics

April 2014

PROFESSIONAL EXPERIENCE

University of Texas at Dallas

Graduate Teaching Assistant – Financial Management course

May 2023- Present

- Educated 20+ students in Financial Management focusing on assignments and projects boosting “A” grades by 15 students.
- Planned, budgeted, and hosted events like case competitions, lab workshops, and guest lectures with an attendance of 80+.
- Formulated on various financial modeling valuation assignments, real estate market studies, and report writing.

CRISIL Global Research and Risk Solutions

Senior Risk Analyst – Wholesale Lending Quality Assurance (QA)

March 2022- December 2022

- Revamped quality assurance process in Wholesale Lending for MNC bank leading to a 40% surge in operational efficiency.
- Trained and mentored a proficient team of 10+ assurance officers, adeptly overseeing script testing across business functions.
- Analyzed data, shared results with business leaders, and cut policy deviations by 28%.
- Acknowledged with an 'Excellence Award' for exceptional work in risk advisory, team leadership, integrity, and accountability.

MNM Wealth Management

Co-Founder

January 2021- March 2022

- Conducted marketing campaigns, nurtured leads, and boosted asset growth by 190% through sales and cross-sales of products.
- Researched potential investment areas and prepared tailor-made plans to satisfy the investment needs of the clients.
- Conducted webinars and information sessions in small corporations to educate about various saving instruments in capital markets.
- Mentored a team of 2 analysts to lay out sales and operations processes from lead generation to onboarding clients.

Bajaj Housing Finance Limited

Credit Analyst- Wholesale Lending (Residential & Commercial Real Estate Financing)

December 2017- January 2021

- Provided strategic planning on the formulation of real estate funding transactions to residential and commercial real estate builders.
 - Credit Underwriting and transaction advisory in more than 50 real estate deals with a cumulative value of more than USD 1250 M.
 - Engaged with customers to understand project execution and business strategy to advise the most suitable debt-equity structure.
 - Pitched appraisals to top management, articulating the outcome of in-depth financial due diligence, financial analysis, ratio analysis, cash flow models, and market analysis using tools like Microsoft Excel, Word, and PowerPoint.
 - Thoroughly scrutinized micro markets, financial statements, forecasted sales and cash flow, sensitivity analysis, and analyzed property cost components using Excel models to effectively mitigate credit risk.
 - Rewarded as ‘Sprinter’ and promoted by Bajaj Housing Finance Ltd for simultaneously working on 5 deals.
-

ORGANIZATIONS:

Graduate Finance Management Council, UTD- Treasurer

May 2023 – Present

The Real Estate Club, UTD

January 2023 – Present

COMPETITIONS:

- **Fin-Hack Competition, UTD** : Secured **3rd place** in Fin-Hack organized by the Finance Lab, UTD in March of 2023.
 - **Excel Financial Modeling, UTD** : Secured **2nd place** in Excel modeling organized by the GFMC, UTD in April of 2023.
-

CERTIFICATIONS: CFA Level 1, Costar, Bloomberg, FactSet, Refinitiv

SOFTWARE: Eikon Datastream, SDS Platinum, Microsoft Excel, Tableau, Capital IQ

ADDITIONAL INFORMATION:

- **Languages:** English, Hindi, Marathi
- **Eligibility:** Eligible to work in the U.S. for internships and for full-time employment for up to 36 months without sponsorship.

Jonathan Garcia

Nevada, Tx, 75173; (214) 710-9195; jonathangar2354@gmail.com
www.linkedin.com/in/jonathangarcia2354

EDUCATION EXPERIENCE

The University of Texas at Dallas

Bachelor of Finance, Concentration in Real Estate
Academic Excellence Scholarship Recipient

May 2024

Richland College, Dallas, Tx

Associate of Science, Finance, Collegiate High School Student

May 2021

PROFESSIONAL EXPERIENCE

Wood Flooring Contractor, DFW Metroplex

January 2016 – Present

- Generated 15 cost estimates per month, resulting in an average of 12 projects scheduled
- Operate, clean, and maintain flooring installation equipment and tools
- Interact with 15+ clients per day in either Spanish or English extending sales reach
- Assess strengths and weaknesses weekly with a plan to improve for the following week

Metal Construction Material Salesman, from home

March 2023 – Present

- Discuss customer needs for construction material according to projects resulting in both company and consumer benefit
- Generated more than \$80,000 in sales of metal construction material in a span of less than 6 months
- Retain contact will almost 100% of customers to promote strong-prolonged connections for future business with repeated buys from customers from the start
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Marketing Representative for Currency Trading Platform, Remote

January 2021 – January 2023

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Certifications: MS Office Specialist for Excel

Software Tools: MS Excel, MS Word, MS Powerpoint

Other: Computer Troubleshooting expertise

ADDITIONAL INFORMATION

Languages: Fluent in Spanish

Eligibility: US Citizen, Eligible to work in the US for internships and full time with no restrictions

Christopher Gilmore

214-815-8984 | christopher.gilmore98@gmail.com | [linkedin.com/in/cgilmore98](https://www.linkedin.com/in/cgilmore98)

Education

Bachelor of Science, Finance – Real Estate Concentration

December 2023 GPA 3.5

Comet Transfer Scholarship

The University of Texas at Dallas

Certifications & Technical Skills

Operation Systems: Windows | QuickBooks | UTD Argus Course Completion | CoStar | Project Destined Financial Modeling Certification

Technical: MS Office | SharePoint | Workday | Excel | Word

Relevant Course Work

Real Estate Principles | Real Estate Finance & Principles | Investment Management | Real Estate Law & Contracts | Real Estate Valuation

Experience

Project Destined

September 2023 – October 2023

Research Analyst Internship

- Collaborated with a team of 8 for market research, property analysis, valuation, and deal financing.
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State Farm Corporate Office

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- Resolved payment discrepancies and ensured payments were issued promptly to appropriate parties.
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Investment Management Project

April 2022 - May 2022

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Nayeli Lira Gomez

Dallas, Tx.; 469-740-9662; Nayeli.lira123@gmail.com

www.linkedin.com/in/nayeli-lira-gomez

EDUCATION

The University of Texas at Dallas

May 2024

Bachelor of Science in Finance with a Concentration in Real Estate Management

Eastfield College, Mesquite, Tx.

May 2020

Associate of Science, General Science Studies

GPA 3.50

PROFESSIONAL EXPERIENCE

Charles Schwab, Westlake, TX.

September 2023 – April 2024

Investor Services Intern

- Engaged with 30+ Schwab clients per day resolving their concerns
- Collaborated with team of 5 outlining recommendations for workplace efficiency and presenting recommendation to executive leadership
- Shadowed and engaged in 10+ senior management meetings with Director documenting and addressing all concerns outlined

Dillards, Garland, TX.

April 2022 – August 2022

Lingerie Department Manager

- Led department team of 6 outlining sales goals daily in morning meetings ensuring goals were met or exceeded
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- Maintained the department floor merchandised and updated to current trends increasing monthly sales by 15%
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February 2019 – January 2022

Assistant Store Manager

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- Led team of 35-50: created schedules, ordered supplies, sorted shipments, and communicated updates on store
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Pharmacy and Surgical Supplies, Dallas, TX.

May 2019 – August 2019

Pharmacy Technician

- Dispensed medication for 50+ prescriptions per day with 100% accuracy
- Prepared and placed labels on bottles and vials, called patients, and organized delivery routes

Trust Group Inc., Farmers Branch, TX.

August 2017 – June 2018

Recruiting Assistant Intern

- Audited 75+ resumes on recruiting websites for possible candidates while assisting with general administration

ADDITIONAL INFORMATION

Technical Skills: Microsoft Excel, Word, SQL, Tableau, ARGUS

Certification: Life and Health Insurance License

Languages: Fluent in Spanish

Eligibility: US Citizen, Eligible to work in the US with no restrictions

Jacqueline Igbokwe

Dallas, TX; 75243; 703-798-1003; JXI220003@UTDALLAS.EDU

www.linkedin.com/in/jacqueline-igbokwe-MBA

EDUCATION EXPERIENCE

The University of Texas at Dallas

December 2023

Master of Business Administration, Real Estate

Virginia Commonwealth University

May 2016

Bachelor of Science, Finance, Risk Management & Insurance

PROFESSIONAL EXPERIENCE

Real Estate Investor, Richmond, Virginia

December 2014 – Present

Owner/Operator

- Crafted property strategies targeting an 8% ROI, leveraging insights from market trends, tax shifts, and local developments.
- Oversaw a \$57,000 annual rental revenue, seamlessly integrating lease contracts, financials, budget forecasts, and maintenance records.
- Achieved 100% occupancy through strategic promotions, ensuring reliable tenancy and mitigating rental risks.

CBRE Investment Management, New York, New York

June 2023 – August 2023

Research Analyst - Summer Associate

- Performed in-depth market analysis and crafted asset reports for properties valued at a minimum of \$5 million, leveraging statistical and econometric methodologies for both managed assets and potential acquisitions.
- Employed a mix of quantitative and qualitative techniques to collect, assess, and forecast economic and real estate data, deriving meaningful insights and actionable market trends to guide strategic decision-making.
- Collaborated on a cross-functional team initiative aiming at the integration of AI technologies across the organization, enhancing operational productivity and elevating employee experience.
- Designed and delivered comprehensive reports and presentations, capturing the latest economic shifts, policy alterations, and market dynamics, ensuring stakeholders were equipped with pertinent and up-to-date insights.

Verus Specialty Insurance(a W.R. Berkley Company), Glen Allen, Virginia

October 2019 – September 2021

Assistant Underwriter

- Utilized proprietary underwriting software and industry knowledge to drive a monthly minimum of \$30,000 in new business premiums.
- Conducted onsite visits and analyzed client inspection reports, prior audits, and endorsements to identify and mitigate potential financial loss due to non-risk acceptability adherence.
- Developed long-term relationships with over 35 agents and brokers via ongoing networking activities.

LendUp, North Chesterfield, Virginia

June 2016 – July 2019

Senior Account Manager - Outbound Loan Loss Management

- Provided leadership and supervision to a team of 10 Account Managers, resulting in a monthly average of \$35,000 loan loss recovery per agent.
- Increased monthly loss recovery by 34% by analyzing data to identify trends and develop process improvements.
- Conducted monthly audits to ensure compliance with federal, state, and regulatory requirements.

Software Experience

- ARGUS
- Microsoft Excel
- Microsoft Powerpoint

PROFESSIONAL & ACADEMIC ORGANIZATION MEMBERSHIP

National Association of Women MBAs, The University of Texas at Dallas - Vice President

May 2022 - Present

The Real Estate Club, The University of Texas at Dallas

August 2022 - Present

The Real Estate Council(TREC)

September 2022 - Present

Eligibility: US Citizen, eligible to work in the US with no restrictions.

MATTHEW LORENTZ

Matthew.Lorentz@utdallas.edu • (713) 360-8943 • LinkedIn.com/in/matthewlorentz/

EDUCATION

The University of Texas at Dallas Bachelor of Science, Finance May 2024
Concentration in Real Estate GPA: 3.82/4.00

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ADDITIONAL INFORMATION

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Certifications: Real Estate Agent License (2021 - Present), Bloomberg Market Concepts (2020)

Interests/Hobbies: Basketball, Chess, Fishing, Gaming, Traveling, Meditation

Work Eligibility: Eligible to work in the United States without restrictions

Oksana Park

McKinney, TX; (347) 619-4311; Oksana.Park@utdallas.edu
www.linkedin.com/in/oksana-park

EDUCATION

The University of Texas at Dallas

Expected: 12/2023 *B.S., Finance*

Honors

GPA 3.83

Deans List

Borough of Manhattan Community College

12/2020 *A.S., Financial Management*

Honors

GPA 3.934

Phi Theta Kappa Society, Deans List

BUSINESS EXPERIENCE

Bank OZK- Real Estate Specialties Group

06/2023 – 08/2023

Summer Intern- Asset Management

- Reviewed newly approved lending facilities, including analysis of property operations, historical and projected revenues and operating, leasing and capital expenditures with respect to the ongoing economic viability of the property and loan
- Evaluated monthly loan draws to ensure compliance with budget, assessing ongoing construction risk and ordering and reviewing title updates
- Reviewed and interpreted loan payoffs and releases of collateral
- Assessed lease agreements, sales contracts and other legal documents related to the loan portfolio
- Interpreted borrower/guarantor financial condition and compliance with loan and guaranty covenants, including reviewing and analyzing tax returns and financial statements.

Capital One Bank, Dallas, TX

11/2019 – 11/2022

Branch Ambassador

- Answered all requests of customers and created solutions for any issues which resulted in 97% customer satisfaction
- Assessed 15 personal and 4 business accounts weekly
- Educated 10-15 customers daily about banking channels
- Ensured customers meet their financial needs by providing 100% customer service
- Performed a teller's duties while having less than 1% errors
- Resolved customers issues with 100% customer satisfaction

ACADEMIC PROJECT EXPERIENCE

- Marketing Plan for PISD Education Foundation 08/2023-11/2023
- Analyzed a significant event in the financial market during the subprime crisis of 2008-2009 02/2023
- Industry champion of The Business Strategy Game 09/2021-12/2021

PROFESSIONAL AFFILIATIONS

Future Business Leaders of America-Phi Beta Lambda, University of Texas at Dallas

09/2022 – Present

Financial Leadership Association, University of Texas at Dallas

09/2022 – Present

TECHNICAL SKILLS

Languages: Bilingual in Ukrainian and Russian

Advanced in English

Basic in Spanish and French

Tools: Microsoft Office, MRI Argus, Tableau Software, Maple Soft Product System, R System

Sai Sunkara

(pronounced "Sigh")

Dallas, TX - cell: 469.536.5039 - saitejasunkara008@gmail.com - <http://www.linkedin.com/in/saitejasunkara3>

OBJECTIVE: To secure a real estate Financial Analyst position that enables me to perform financial modeling, valuation, market research, development, and risk management.

CERTIFICATIONS: LEED Green Associate, Certified Associate in Project Management

EDUCATION

The University of Texas at Dallas, **M.S. Finance, Concentration in Real Estate** * Fellowship Awardee **December 2023**

* Introduction to Real Estate

* Real Estate Finance and Investments

* Real Estate Market Analysis and Investments

* Technologies: ARGUS Enterprise, CoStar and Yardi

Amity University Maharashtra **August 2019**

MBA, Construction Project Management, First Division with Distinction, Best All-Round Student Award, Bronze Medal

Jawaharlal Nehru Technological University Anantapur **May 2017**

B.Tech., Civil Engineering, First Class with Distinction

BUSINESS EXPERIENCE

Bridge Investment Group, Salt Lake City, United States of America **May 2023 – August 2023**

Summer Development Analyst - Qualified Opportunity Zones

- Assisting the senior analyst and director in updating cost reports, contract trackers, budget forecasts, and asset summary reports for a portfolio of 80+ projects and creating a project stakeholder database consisting of 400+ entities.
- Reviewed due diligence reports, budgets, change orders, draws, and project schedules for multifamily ground-up projects. Increased my proficiency in underwriting models and CoStar by interacting with analysts.

Cushman & Wakefield India Private Limited **August 2021 – July 2022**

Project Coordinator – Office Fit-Out Projects

- Reviewed billings worth of \$5 million and saved \$0.3 million by providing design advisory.
- Led a team of 25+ contractors during construction to allocate weekly activities by creating weekly look ahead plans, trackers and checklist, improving labor productivity by 5%. Reviewed and validated change orders.

CBRE South Asia Private Limited **June 2019 – January 2021**

Project Coordinator – Ground-up Office Development

- Managed project documentation, coordination and improved document retrieving and team collaboration by 15%. Orchestrated all project meetings by setting agendas and publishing minutes.
- Assisted regional audit manager during safety and quality audits and prepared various management reports.

LEADERSHIP EXPERIENCE AND ORGANIZATIONS

Real Estate Club at UTD – Board Member **Dec 2022 – Present**

NTCAR Student Member **Dec 2022 – Present**

U.S. Green Building Council Student Volunteer, Amity University **November 2018 – November 2018**

ADDITIONAL INFORMATION

Athletics: Won Intra University Cricket Championship, Amity University, October 2018

Languages: English, Telugu, Hindi

Eligibility: Eligible to work in the US for internships and full time for up to 36 months without sponsorship

REFERENCE Jim Trythall, Managing Director, Bridge Investment Group. 435.851.0211

Julie Lynch, Director, Weitzman Institute for Real Estate at The University of Texas at Dallas. 214.883.4721

REAL ESTATE
INVESTMENTS
Permanent Jobs



**Herbert D. Weitzman
Institute for Real Estate**

Divyesh Asmani

Dallas, Tx, 75252 | +1 (760) 927 2681 | Divyesh.Asmani@utdallas.edu | <https://www.linkedin.com/in/divyesh-asmani>

EDUCATION

Master of Science in Finance | The University of Texas at Dallas, Texas | May 24 | **GPA 3.67**

Bachelor of Engineering in Instrumentation & Control | Gujarat Technological University | June 21 | **GPA 3.40**

TECHNICAL SKILLS

Certifications: Mutual Fund Distributor – VA, Bloomberg Market Concepts (BMC), FactSet

Programming: R Programming, Python, SQL

Software: ARGUS modeling, MS Excel, PowerPoint, Word, PowerBi, Outlook, Tableau, Tome Ai, ChatGPT (prompts).

Databases: FactSet, Crunchbase, Refinitiv Workspace, Capital IQ, Bloomberg

ADDITIONAL

Languages: English, Hindi, Gujarati

Eligibility: Eligible to work in the US for internships and full-time for up to 36 months on F1 Student Visa under the STEM. I

possess a valid driving license and SSN

PROFESSIONAL EXPERIENCE

Teaching Assistant | The University of Texas at Dallas, Tx

Aug 23 – Present

- Assisted Dr. Hirofumi Nishi in Financial Management and Prof. Julie Lynch in three Real Estate courses, serving **150 students**.
- Employed dynamic teaching techniques and maintained strict time management across multiple classes.
- Managed and assessed diverse assignments, ensuring consistent and fair scoring.
- Offered real-world examples and continuous learning/feedback, fostering an enriched learning environment during TA hours.

Financial Compliance Assistant | The University of Texas at Dallas, Tx

Dec 22 – Aug 23

- Spearheaded the enhancement of internal controls, achieving flawless compliance in the UTD system and innovating a process that boosted One Card program efficiency by 20%.
- Analyzed and ensured compliance for **35,000 transactions totaling \$7M**, using tools such as Excel, PowerPoint, and SQL Query for detailed reporting. Extensively used Excel Functions like Vlookup, Data Tables, Pivot Tables, optimization, and Macros.
- Regularly synthesized and presented complex financial data, enhancing transactional clarity and accuracy.
- Pioneered a culture of mentorship, guiding new team members through financial compliance and sophisticated internal controls.

Finance Development Intern | Enkay Investments, Surat, India

Sep 21 – March 22

- Advised **50+ clients** on tailored investment products, aligning with their risk profiles and investment goals.
- Revamped client database maintenance, bolstering engagement and streamlining follow-ups.
- Crafted and delivered influential client presentations, fostering strong, strategic partnerships.
- Analyzed 10+ Mutual Funds and Portfolio Management Services using advanced analytics for informed decision-making.

ACADEMIC PROJECT EXPERIENCE

- Created FP&A model for Mercury Athletic Footwear (HBR Case Study) Valuing different business opportunities and presenting them with appropriate **Valuation models** and outcomes, **July 2023**
- Created financial models for an “Industrial” and an “Office” space using ARGUS in the “**ARGUS** workshop” arranged by the Real Estate Club at the UTD, **Nov 2022**
- Analyzed stock returns, correlation, variance, and standard deviation using excel as a group project “Mathematical Methods for Finance” using **Advanced Excel** at UTD, **Oct 2022**
- Created a visual dashboard for “Sales over geography” and “Sales over time” at the **Power Bi** boot camp at UTD organized by Envision Cub, **Oct 2022**
- Created a visual dashboard for “Employee Satisfaction” to reduce Attrition at the **Tableau** boot camp at UTD organized by Envision Club, **Sept 2023**

COMPETITIONS & LEADERSHIP EXPERIENCE

- Awarded Best Intern award at Experts-hub Training & Internship program for completing the project and leading a team of 10 participants at Savitribai Phule University, Pune
- International Society for Automation, Student Chapter SARVA, Treasurer from Aug 2019 to Feb 2021
- Secured 1st position in Entrepreneurship Project Awareness Camp organized by EDC cell, SCET, GTU
- Elected as a Class Representative for the freshmen year in the academic year 2017-2018

Jamari Taye Bowers

Dallas, Texas; (346)-252-2078; jtdbowers@gmail.com
<https://www.linkedin.com/in/jamaribowers/>

EDUCATION

The University of Texas at Dallas

May 2024

Bachelor of Science, Finance - Real Estate Investment Management Track

PROFESSIONAL EXPERIENCE

PGIM Real Estate

June 2023 – Present

Asset Management Intern

- Processed borrower requests on Prudential's general account for loans valued up to \$250 million.
- Prepared credit action case plan writeups for leasing and SNDA requests.
- Developed impact analysis inclusive of local market conditions, property operating data, and relevant loan provisions for lease consents.
- Maintained communications with borrowers regarding post-closing and other loan obligations.
- Received and processed preliminary lien notices inclusive of communicating with the borrower for a resolution and documenting in Loan Connect.
- Contributed to bi-weekly departmental pipeline meetings to maintain company workflow.

Simisola Holdings LLC

November 2021 – June 2023

Investment Analyst

- Conducted market research on residential properties in the Greater Houston area.
- Analyzed investment opportunities on properties up to \$1 Million in value.
- Organized and presented CMA reports to stakeholders using Microsoft Excel.
- Processed tenant rent roll payments and executed maintenance requests.

HARRIS Manufactured Housing & Commercial Brokerage

March 2022 – September 2022

Research Associate

- Utilized Instant Checkmate and thorough research to gather ownership data of properties valued up to \$20M.
- Conducted cold calls to confirm property and owner contact information.
- Maintained database in ArcGIS to provide current and accurate information for senior associates.

ACADEMIC PROJECTS & RELEVANT COURSEWORK

- Real Estate Valuation (Capstone Course Project) October 2023 – December 2023
 - Utilized market and financial analysis skills to make the best decision for a development project.
 - Collaborated with group members to prepare and present findings and suggestions.
- Real Estate Law and Contracts
- Real Estate Finance and Principles
- Real Estate Markets and Investments
- Commercial Property Risk Management and Insurance

ORGANIZATIONS AND HONORS

Real Estate Club, UTD

August 2020 – Present

Undergraduate Success Scholars, UTD

August 2020 – Present

Black Student Alliance, UTD

August 2022 – Present

Davidson Management Honors Program, UTD

August 2020 – January 2022

ADDITIONAL INFORMATION

Technical Skills: CoStar, Loan Connect, ARGUS, Excel, Microsoft Office, Zoom, Google Suite, ArcGIS, Think-Cell.

Languages: Native English

Eligibility: US Citizen. Eligible to work in the US with no restrictions. Willing to relocate for work.

MADHUR SUNIL CHAUDHARI

Richardson, TX, 75080; 945-257-5742; madhur.c6@gmail.com LinkedIn: <https://in.linkedin.com/in/madhurchaudhari>

EDUCATION

The University of Texas at Dallas (UTD)

Master of Science, Finance

Herbert D. Weitzman Real Estate Fellowship recipient

December 2024

GPA- 3.7

Institute of Chartered Accountants of India (ICAI)

Chartered Accountant, Accounting and Finance

January 2017

Savitribai Phule Pune University

Bachelor of Commerce, Statistics

April 2014

PROFESSIONAL EXPERIENCE

University of Texas at Dallas

Graduate Teaching Assistant – Financial Management course

May 2023- Present

- Educated 20+ students in Financial Management focusing on assignments and projects boosting “A” grades by 15 students.
- Planned, budgeted, and hosted events like case competitions, lab workshops, and guest lectures with an attendance of 80+.
- Formulated on various financial modeling valuation assignments, real estate market studies, and report writing.

CRISIL Global Research and Risk Solutions

Senior Risk Analyst – Wholesale Lending Quality Assurance (QA)

March 2022- December 2022

- Revamped quality assurance process in Wholesale Lending for MNC bank leading to a 40% surge in operational efficiency.
- Trained and mentored a proficient team of 10+ assurance officers, adeptly overseeing script testing across business functions.
- Analyzed data, shared results with business leaders, and cut policy deviations by 28%.
- Acknowledged with an 'Excellence Award' for exceptional work in risk advisory, team leadership, integrity, and accountability.

MNM Wealth Management

Co-Founder

January 2021- March 2022

- Conducted marketing campaigns, nurtured leads, and boosted asset growth by 190% through sales and cross-sales of products.
- Researched potential investment areas and prepared tailor-made plans to satisfy the investment needs of the clients.
- Conducted webinars and information sessions in small corporations to educate about various saving instruments in capital markets.
- Mentored a team of 2 analysts to lay out sales and operations processes from lead generation to onboarding clients.

Bajaj Housing Finance Limited

Credit Analyst- Wholesale Lending (Residential & Commercial Real Estate Financing)

December 2017- January 2021

- Provided strategic planning on the formulation of real estate funding transactions to residential and commercial real estate builders.
 - Credit Underwriting and transaction advisory in more than 50 real estate deals with a cumulative value of more than USD 1250 M.
 - Engaged with customers to understand project execution and business strategy to advise the most suitable debt-equity structure.
 - Pitched appraisals to top management, articulating the outcome of in-depth financial due diligence, financial analysis, ratio analysis, cash flow models, and market analysis using tools like Microsoft Excel, Word, and PowerPoint.
 - Thoroughly scrutinized micro markets, financial statements, forecasted sales and cash flow, sensitivity analysis, and analyzed property cost components using Excel models to effectively mitigate credit risk.
 - Rewarded as ‘Sprinter’ and promoted by Bajaj Housing Finance Ltd for simultaneously working on 5 deals.
-

ORGANIZATIONS:

Graduate Finance Management Council, UTD- Treasurer

May 2023 – Present

The Real Estate Club, UTD

January 2023 – Present

COMPETITIONS:

- **Fin-Hack Competition, UTD** : Secured **3rd place** in Fin-Hack organized by the Finance Lab, UTD in March of 2023.
 - **Excel Financial Modeling, UTD** : Secured **2nd place** in Excel modeling organized by the GFMC, UTD in April of 2023.
-

CERTIFICATIONS: CFA Level 1, Costar, Bloomberg, FactSet, Refinitiv

SOFTWARE: Eikon Datastream, SDS Platinum, Microsoft Excel, Tableau, Capital IQ

ADDITIONAL INFORMATION:

- **Languages:** English, Hindi, Marathi
- **Eligibility:** Eligible to work in the U.S. for internships and for full-time employment for up to 36 months without sponsorship.

Jonathan Garcia

Nevada, Tx, 75173; (214) 710-9195; jonathangar2354@gmail.com
www.linkedin.com/in/jonathangarcia2354

EDUCATION EXPERIENCE

The University of Texas at Dallas

Bachelor of Finance, Concentration in Real Estate
Academic Excellence Scholarship Recipient

May 2024

Richland College, Dallas, Tx

Associate of Science, Finance, Collegiate High School Student

May 2021

PROFESSIONAL EXPERIENCE

Wood Flooring Contractor, DFW Metroplex

January 2016 – Present

- Generated 15 cost estimates per month, resulting in an average of 12 projects scheduled
- Operate, clean, and maintain flooring installation equipment and tools
- Interact with 15+ clients per day in either Spanish or English extending sales reach
- Assess strengths and weaknesses weekly with a plan to improve for the following week

Metal Construction Material Salesman, from home

March 2023 – Present

- Discuss customer needs for construction material according to projects resulting in both company and consumer benefit
- Generated more than \$80,000 in sales of metal construction material in a span of less than 6 months
- Retain contact will almost 100% of customers to promote strong-prolonged connections for future business with repeated buys from customers from the start
- Promote products using social media to gain reach and expand to local and surrounding markets
- Master the use of Facebook Marketplace, as well as Instagram and TikTok sales generating more than 75% of total sales

Marketing Representative for Currency Trading Platform, Remote

January 2021 – January 2023

- Assessed client needs to determine markets to invest with over 88% satisfaction rate
- Researched foreign exchange financial markets to determine where the market is and where the market is going
- Advised of particular currencies/investments based on market trends to get more than 8% returns for customers
- Developed strategies to capitalize on emerging opportunities within the currency market all while staying within the plan
- Advised over 65 people and led teams towards success within the marketing side of the education platform

ORGANIZATIONS AND LEADERSHIP EXPERIENCE

Social Impact Marketing Fundraising Project, UT Dallas, Project Leader

August 2023 – December 2023

- Maintain effective communication within group to promote teamwork
- Schedule necessary and supplementary meetings for work completion
- Communicate with project sponsors to maintain an understanding of project scope and direction of the project
- Execute plans with confidence but with flexibility to adapt to any possible changes

Catholic Charities of Dallas, Application Processing Assistant

August 2019 – August 2021

- Demonstrated competence with Excel to input client information
- Collaborated with event sponsors and managers to run events
- Analyzed data to then interpret trends/patterns within the community

TECHNICAL SKILLS

Certifications: MS Office Specialist for Excel

Software Tools: MS Excel, MS Word, MS Powerpoint

Other: Computer Troubleshooting expertise

ADDITIONAL INFORMATION

Languages: Fluent in Spanish

Eligibility: US Citizen, Eligible to work in the US for internships and full time with no restrictions

Christopher Gilmore

214-815-8984 | christopher.gilmore98@gmail.com | [linkedin.com/in/cgilmore98](https://www.linkedin.com/in/cgilmore98)

Education

Bachelor of Science, Finance – Real Estate Concentration

December 2023 GPA 3.5

Comet Transfer Scholarship

The University of Texas at Dallas

Certifications & Technical Skills

Operation Systems: Windows | QuickBooks | UTD Argus Course Completion | CoStar | Project Destined Financial Modeling Certification

Technical: MS Office | SharePoint | Workday | Excel | Word

Relevant Course Work

Real Estate Principles | Real Estate Finance & Principles | Investment Management | Real Estate Law & Contracts | Real Estate Valuation

Experience

Project Destined

September 2023 – October 2023

Research Analyst Internship

- Collaborated with a team of 8 for market research, property analysis, valuation, and deal financing.
- Completed Financial Modeling Certification led by Graduate School professors at NYU/Associate at Brookfield Properties.
- Prepared and presented investment memo to professionals from Brookfield Properties.

State Farm Corporate Office

May 2023 – August 2023

P&C Underwriting Internship

- Researched and developed recommendations for enhancing State Farm and their future role strategies and future technology.
- Developed and implemented templates to monitor daily task touchpoints, enabling identification of gaps in underwriters' handling and process efficiency.
- Collaborated with peer interns to analyze productivity at home compared to that in the office for production employees.

State Farm Corporate Office

May 2022 - August 2022

P&C Claims Internship

- Resolved payment discrepancies and ensured payments were issued promptly to appropriate parties.
- Cooperated with accounting to reconcile accounts to ensure consistency throughout multiple customer accounts.
- Reviewed estimates received from partners or non-partners to ensure costs aligned with the loss.

Projects

Luna Blanca

September 2023 – October 2023

- Researched and presented a property analysis, valuation, and deal financing of an existing property near the Bishop Arts District.

AI and the Impact on Future Role Strategy

May 2023 - August 2023

- Researched and presented to Team Managers and the Vice President of Operations of Richardson/Dallas the impacts of AI in the Property & Casualty Insurance space, the impact these will have on State Farm, and future roles.

Impact of Inflation to State Farm

July 2022 - August 2022

- Researched the impact of inflation on State Farm products and presented ideas on how to mitigate the effects by reducing costs to several Team Managers and the Vice President of Operations of Richardson/Dallas.

Investment Management Project

April 2022 - May 2022

- Analyzed historical data of 11 stocks from the S&P 500 to make predictions of their performance and constructed portfolios with different risk tolerances, where \$5,000 dollars were invested.

Nayeli Lira Gomez

Dallas, Tx.; 469-740-9662; Nayeli.lira123@gmail.com

www.linkedin.com/in/nayeli-lira-gomez

EDUCATION

The University of Texas at Dallas

May 2024

Bachelor of Science in Finance with a Concentration in Real Estate Management

Eastfield College, Mesquite, Tx.

May 2020

Associate of Science, General Science Studies

GPA 3.50

PROFESSIONAL EXPERIENCE

Charles Schwab, Westlake, TX.

September 2023 – April 2024

Investor Services Intern

- Engaged with 30+ Schwab clients per day resolving their concerns
- Collaborated with team of 5 outlining recommendations for workplace efficiency and presenting recommendation to executive leadership
- Shadowed and engaged in 10+ senior management meetings with Director documenting and addressing all concerns outlined

Dillard's, Garland, TX.

April 2022 – August 2022

Lingerie Department Manager

- Led department team of 6 outlining sales goals daily in morning meetings ensuring goals were met or exceeded
- Informed team of new department practices leading to increased sales performance
- Maintained the department floor merchandised and updated to current trends increasing monthly sales by 15%
- Implemented departmental breast cancer fundraising events resulting in 90% increase in monthly sales

Forever 21, Mesquite, TX.

February 2019 – January 2022

Assistant Store Manager

- Oversaw store operations ensuring compliance and responsible for \$7K+ store sales cash deposits daily
- Led team of 35-50: created schedules, ordered supplies, sorted shipments, and communicated updates on store
- Trained 45 newly recruited and current team member resulting in a 2% turnover rate
- Oversaw weekly payroll of \$10,000 for 35-50 employees
- Analyzed daily sales against target implementing strategies to avoid sales decrease resulting in average of 30% monthly revenue increase

Pharmacy and Surgical Supplies, Dallas, TX.

May 2019 – August 2019

Pharmacy Technician

- Dispensed medication for 50+ prescriptions per day with 100% accuracy
- Prepared and placed labels on bottles and vials, called patients, and organized delivery routes

Trust Group Inc., Farmers Branch, TX.

August 2017 – June 2018

Recruiting Assistant Intern

- Audited 75+ resumes on recruiting websites for possible candidates while assisting with general administration

ADDITIONAL INFORMATION

Technical Skills: Microsoft Excel, Word, SQL, Tableau, ARGUS

Certification: Life and Health Insurance License

Languages: Fluent in Spanish

Eligibility: US Citizen, Eligible to work in the US with no restrictions

Brett Huff

Plano, Tx, 75075; 817-600-1762; brettjet222@gmail.com
https://www.linkedin.com/in/brett-huff-66b97b21b/

Objective

Highly coachable, passionate, and self-motivated college student seeking permanent job opportunity in Finance, Sales and Real Estate upon graduation.

EDUCATION

The University of Texas at Dallas

Bachelor of Finance, Minor: Sales/Real Estate

Honors/Scholarship(s)- Phi Theta Kappa, Comet Transfer Scholarship, Academic All-ASC

May 2024

GPA 3.3

Hill College Associates Degree – Hillsboro, Tx

Associate of Business Administration

Honors/ Scholarship(s)- NSLS Member, Dean’s List, Full Athletic Scholarship

May 2021

GPA 3.96

PROFESSIONAL EXPERIENCE

MHC Kenworth – Dallas, Tx

May 2023 – August 2023

Operations and Management Intern

- Closed deals up to \$70,000 and managed monthly financial statements for operations
- Communicated to large clients including Amazon in a fast paced environment efficiently and effectively
- Proactively managed logistics and customer accounts with service and parts
- Shadowed management through audits and employee complications

UTD Sales Program

August 2021 – December 2022

Sales Development Representative

- Achieved 460% of quota finishing 2nd in a program of 150 students
- Demonstrated mastery over Salesforce, LinkedIn Sales Navigator, Chorus.AI, XIQ and Xvoyant
- Skills Include: Digital Prospecting, Live Selling, Account Management

Lawson Event Rentals, Richardson, Tx

August 2021 – December 2022

Event Assistant

- Contributed to activities involved with setting up weddings and other major events
- Help clients achieve their very personal and meaningful vision for their event
- Work the late night shifts during school days and weekends

LEADERSHIP EXPERIENCE

Team Captain, Liberty Christian Baseball

August 2019 – May 2019

- Voted a team Captain by my peers’ Senior year
- Lead the team to State Championship titles in 2018 and 2019
- Implemented a culture of accountability and equality

Member, Leadership Training Academy

August 2018 – May 2019

- Mentored elementary school kids and provided advice on their unique issues
- Coached and taught elementary school kids reading and math skills

ORGANIZATIONS

Waterfall Academy – Volunteer

September 2021 – Present

- Supervise special needs kids in both academic and athletic areas

Athlete, Hill College and UT Dallas – Player

August 2021 – Present

- Contributed to a team that Won the ASC Conference Championship

Real Estate Club, UT Dallas – Member

August 2022 – Present

- Actively involved in club meetings, events, and discussions

ADDITIONAL INFORMATION

Technical: [ARGUS Enterprise, Microsoft Excel/Word/Powerpoint, LucidChart, Salesforce, Chorus.AI]

Valuable Classes: ITSS 3300 (Information Technology), FIN 3320 (Corporate Finance), MKT 4332 (Professional Sales)

Jacqueline Igbokwe

Dallas, TX; 75243; 703-798-1003; JXI220003@UTDALLAS.EDU

www.linkedin.com/in/jacqueline-igbokwe-MBA

EDUCATION EXPERIENCE

The University of Texas at Dallas

December 2023

Master of Business Administration, Real Estate

Virginia Commonwealth University

May 2016

Bachelor of Science, Finance, Risk Management & Insurance

PROFESSIONAL EXPERIENCE

Real Estate Investor, Richmond, Virginia

December 2014 – Present

Owner/Operator

- Crafted property strategies targeting an 8% ROI, leveraging insights from market trends, tax shifts, and local developments.
- Oversaw a \$57,000 annual rental revenue, seamlessly integrating lease contracts, financials, budget forecasts, and maintenance records.
- Achieved 100% occupancy through strategic promotions, ensuring reliable tenancy and mitigating rental risks.

CBRE Investment Management, New York, New York

June 2023 – August 2023

Research Analyst - Summer Associate

- Performed in-depth market analysis and crafted asset reports for properties valued at a minimum of \$5 million, leveraging statistical and econometric methodologies for both managed assets and potential acquisitions.
- Employed a mix of quantitative and qualitative techniques to collect, assess, and forecast economic and real estate data, deriving meaningful insights and actionable market trends to guide strategic decision-making.
- Collaborated on a cross-functional team initiative aiming at the integration of AI technologies across the organization, enhancing operational productivity and elevating employee experience.
- Designed and delivered comprehensive reports and presentations, capturing the latest economic shifts, policy alterations, and market dynamics, ensuring stakeholders were equipped with pertinent and up-to-date insights.

Verus Specialty Insurance(a W.R. Berkley Company), Glen Allen, Virginia

October 2019 – September 2021

Assistant Underwriter

- Utilized proprietary underwriting software and industry knowledge to drive a monthly minimum of \$30,000 in new business premiums.
- Conducted onsite visits and analyzed client inspection reports, prior audits, and endorsements to identify and mitigate potential financial loss due to non-risk acceptability adherence.
- Developed long-term relationships with over 35 agents and brokers via ongoing networking activities.

LendUp, North Chesterfield, Virginia

June 2016 – July 2019

Senior Account Manager - Outbound Loan Loss Management

- Provided leadership and supervision to a team of 10 Account Managers, resulting in a monthly average of \$35,000 loan loss recovery per agent.
- Increased monthly loss recovery by 34% by analyzing data to identify trends and develop process improvements.
- Conducted monthly audits to ensure compliance with federal, state, and regulatory requirements.

Software Experience

- ARGUS
- Microsoft Excel
- Microsoft Powerpoint

PROFESSIONAL & ACADEMIC ORGANIZATION MEMBERSHIP

National Association of Women MBAs, The University of Texas at Dallas - Vice President

May 2022 - Present

The Real Estate Club, The University of Texas at Dallas

August 2022 - Present

The Real Estate Council(TREC)

September 2022 - Present

Eligibility: US Citizen, eligible to work in the US with no restrictions.

Mohamed Adam Landolsi

Richardson, TX, 75080; 469-924-7007; mlandolsi99@hotmail.com

www.linkedin.com/in/m-adam-landolsi-b99393aa

EDUCATION

The University of Texas at Dallas

Master of Science in Finance (MS FIN), Finance

December 2024

GPA 3.80

Concordia University – John Molson School of Business, Canada

Bachelor of Commerce, Finance

December 2021

GPA 3.50

The American University of Sharjah, United Arab Emirates

Bachelors in Business Administration, Finance

May 2019

GPA 3.80

Dean's and Chancellor's list two years in a row

PROFESSIONAL EXPERIENCE

LP Analyst, Dallas, Texas

October 2022 – Current

Private Equity Analyst

- Organizing and evaluating more than 100 Private Equity, Venture Capital, Real Estate, Real Asset, Infrastructure and Credit strategies that helped enhanced clients' overall decision making.
- Analyzing and structuring private asset fund financial data, including performance, underlying investment, and cash flow details of funds with more than 100B AuM
- Coordinating with private asset managers to collect relevant data and assisted in developing a new tracking system that increased data collection by 20%

ESB LLC., France (Paris)

June 2017 – August 2017

Summer Intern

- Acquired construction and renovation materials and delivered them on-site in a timely manner to teams working on the renovation of on-site restaurants.
- Collaborated with the management team with clerical tasks such as filling out order checks, coordinating payments with suppliers, and following up with delivery.
- Developed a business proposal that improved business operations and increased efficiency by 135%.

ACADEMIC PROJECT EXPERIENCE

Technical Analysis Project, Concordia University – FINA 408

January 2021– April 2021

- Developed and back tested a trading system using both technical and fundamental analysis.
- Used TradingView's Pine Script language to develop the non-discretionary trading system that enhanced returns by over 25%.

Investment Analysis Project, Concordia University – FINA 410

- Valued two Canadian recreational vehicle companies and provided investment thesis using the DCF model based on more than 10 comparable company valuations.
- Forecasted the 3-financial statements for the two companies and developed projections for performance over a 5-year horizon.

VOLUNTEER ORGANIZATIONS

Friends of Cancer Patients, Volunteer

January 2018 – March 2018

IWAS Special Olympics, Activities Coordinator and Volunteer

January 2018 – March 2018

ADDITIONAL INFORMATION

Skills: Excel, PowerPoint, MySQL, Python, RStudio

Languages: French, English, Arabic

Eligibility: US Citizen, Eligible to work in the US for internships and full time with no restrictions.

MATTHEW LORENTZ

Matthew.Lorentz@utdallas.edu • (713) 360-8943 • LinkedIn.com/in/matthewlorentz/

EDUCATION

The University of Texas at Dallas Bachelor of Science, Finance May 2024
Concentration in Real Estate GPA: 3.82/4.00

EXPERIENCE

Central Metro Realty - Licensed Realtor; Dallas, TX May 2021 - Present

- Utilized the 3 real estate valuation techniques to conduct market research and ensure precise property assessments
- Facilitated the closure of a residential real estate transaction exceeding \$1,000,000

Capital Factory - Venture Fellow; Dallas, TX January 2021 - June 2021

- Evaluated 5 startups across the technology and food products industries using qualitative (SWOT, Porter's Five Forces) and financial analysis to determine viability for investment
- Performed data analysis on 300+ portfolio companies to compare the fund's performance to benchmarks
- Presented results and recommendations from the data analysis to CEO

Lindale Partners - Private Equity Intern; Dallas, TX June 2020 - July 2020

- Analyzed the financials and information memorandums of potential acquisition targets with EBITDA up to \$10M
- Created 3 investment recommendation reports to present to the firm's senior partner

Prime Natural Resources - Private Equity Intern; Houston, TX March 2020 - June 2020

- Conducted research on 2 public companies, compiled all findings into slide decks, and presented the results to the investment team
- Provided a high-level overview of business segment and industry performance during the COVID-19 pandemic

ACADEMIC PROJECTS

UT Dallas Seed Fund - Student Venture Capital Associate Fall 2021

- Collaborated with 6 other students to source, perform due diligence, create investment memorandums, and ultimately recommend a UT-Dallas affiliated startup for \$100k in grant funding
- Developed an evaluation matrix used to conduct due diligence on 20+ startups

LEADERSHIP EXPERIENCE AND ACTIVITIES

Students Promoting Acts of Random Kindness - Treasurer Spring 2022 - Present

- Streamlined the organization's semesterly funding process using Qualtrics
- Constructed annual fiscal reports and coordinated monetary decisions in accordance with university policies

Professional Program in Finance (PPF) - 5th Cohort Member Fall 2021 - Present

- Selected as 1 of 40 finance students (100+ applicants) for a competitive university program
- Completed the PPF financial modelling training course designed to enhance technical skills for a career in finance

Entrepreneurship Club - Treasurer Fall 2020 - Summer 2021

- Organized meetings and events with the goal of connecting DFW based startups to university students
- Created a formal sponsorship packet outlining club-offered benefit packages, resulting in a 200% increase in sponsorships
- Facilitated a \$1,500 budget plan and tracked monthly spending for events and ventures

ADDITIONAL INFORMATION

Computer Skills: Asana, HubSpot, Capital IQ, MS Excel (Pivot Tables, VLOOKUP), Word, PowerPoint

Certifications: Real Estate Agent License (2021 - Present), Bloomberg Market Concepts (2020)

Interests/Hobbies: Basketball, Chess, Fishing, Gaming, Traveling, Meditation

Work Eligibility: Eligible to work in the United States without restrictions

Oksana Park

McKinney, TX; (347) 619-4311; Oksana.Park@utdallas.edu
www.linkedin.com/in/oksana-park

EDUCATION

The University of Texas at Dallas

Expected: 12/2023 *B.S., Finance*

Honors

GPA 3.83

Deans List

Borough of Manhattan Community College

12/2020 *A.S., Financial Management*

Honors

GPA 3.934

Phi Theta Kappa Society, Deans List

BUSINESS EXPERIENCE

Bank OZK- Real Estate Specialties Group

06/2023 – 08/2023

Summer Intern- Asset Management

- Reviewed newly approved lending facilities, including analysis of property operations, historical and projected revenues and operating, leasing and capital expenditures with respect to the ongoing economic viability of the property and loan
- Evaluated monthly loan draws to ensure compliance with budget, assessing ongoing construction risk and ordering and reviewing title updates
- Reviewed and interpreted loan payoffs and releases of collateral
- Assessed lease agreements, sales contracts and other legal documents related to the loan portfolio
- Interpreted borrower/guarantor financial condition and compliance with loan and guaranty covenants, including reviewing and analyzing tax returns and financial statements.

Capital One Bank, Dallas, TX

11/2019 – 11/2022

Branch Ambassador

- Answered all requests of customers and created solutions for any issues which resulted in 97% customer satisfaction
- Assessed 15 personal and 4 business accounts weekly
- Educated 10-15 customers daily about banking channels
- Ensured customers meet their financial needs by providing 100% customer service
- Performed a teller's duties while having less than 1% errors
- Resolved customers issues with 100% customer satisfaction

ACADEMIC PROJECT EXPERIENCE

- Marketing Plan for PISD Education Foundation 08/2023-11/2023
- Analyzed a significant event in the financial market during the subprime crisis of 2008-2009 02/2023
- Industry champion of The Business Strategy Game 09/2021-12/2021

PROFESSIONAL AFFILIATIONS

Future Business Leaders of America-Phi Beta Lambda, University of Texas at Dallas

09/2022 – Present

Financial Leadership Association, University of Texas at Dallas

09/2022 – Present

TECHNICAL SKILLS

Languages: Bilingual in Ukrainian and Russian

Advanced in English

Basic in Spanish and French

Tools: Microsoft Office, MRI Argus, Tableau Software, Maple Soft Product System, R System

Sai Sunkara

(pronounced "Sigh")

Dallas, TX - cell: 469.536.5039 - saitejasunkara008@gmail.com - <http://www.linkedin.com/in/saitejasunkara3>

OBJECTIVE: To secure a real estate Financial Analyst position that enables me to perform financial modeling, valuation, market research, development, and risk management.

CERTIFICATIONS: LEED Green Associate, Certified Associate in Project Management

EDUCATION

The University of Texas at Dallas, **M.S. Finance, Concentration in Real Estate** * Fellowship Awardee **December 2023**

* Introduction to Real Estate

* Real Estate Finance and Investments

* Real Estate Market Analysis and Investments

* Technologies: ARGUS Enterprise, CoStar and Yardi

Amity University Maharashtra **August 2019**

MBA, Construction Project Management, First Division with Distinction, Best All-Round Student Award, Bronze Medal

Jawaharlal Nehru Technological University Anantapur **May 2017**

B.Tech., Civil Engineering, First Class with Distinction

BUSINESS EXPERIENCE

Bridge Investment Group, Salt Lake City, United States of America **May 2023 – August 2023**

Summer Development Analyst - Qualified Opportunity Zones

- Assisting the senior analyst and director in updating cost reports, contract trackers, budget forecasts, and asset summary reports for a portfolio of 80+ projects and creating a project stakeholder database consisting of 400+ entities.
- Reviewed due diligence reports, budgets, change orders, draws, and project schedules for multifamily ground-up projects. Increased my proficiency in underwriting models and CoStar by interacting with analysts.

Cushman & Wakefield India Private Limited **August 2021 – July 2022**

Project Coordinator – Office Fit-Out Projects

- Reviewed billings worth of \$5 million and saved \$0.3 million by providing design advisory.
- Led a team of 25+ contractors during construction to allocate weekly activities by creating weekly look ahead plans, trackers and checklist, improving labor productivity by 5%. Reviewed and validated change orders.

CBRE South Asia Private Limited **June 2019 – January 2021**

Project Coordinator – Ground-up Office Development

- Managed project documentation, coordination and improved document retrieving and team collaboration by 15%. Orchestrated all project meetings by setting agendas and publishing minutes.
- Assisted regional audit manager during safety and quality audits and prepared various management reports.

LEADERSHIP EXPERIENCE AND ORGANIZATIONS

Real Estate Club at UTD – Board Member **Dec 2022 – Present**

NTCAR Student Member **Dec 2022 – Present**

U.S. Green Building Council Student Volunteer, Amity University **November 2018 – November 2018**

ADDITIONAL INFORMATION

Athletics: Won Intra University Cricket Championship, Amity University, October 2018

Languages: English, Telugu, Hindi

Eligibility: Eligible to work in the US for internships and full time for up to 36 months without sponsorship

REFERENCE Jim Trythall, Managing Director, Bridge Investment Group. 435.851.0211

Julie Lynch, Director, Weitzman Institute for Real Estate at The University of Texas at Dallas. 214.883.4721

#hire JSOM

Contact EmployerRelations@UTDallas.edu
about posting a job opportunity on UTD
"Handshake" job board.



For more information about the
Herbert D. Weitzman Institute for Real Estate,
Concentrations in Real Estate or The Real Estate Club at UTD,
please contact
Julie Lynch, Director Weitzman Institute for Real Estate
Julie.Lynch@UTDallas.edu
972.883.4721



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