

Alex Chen

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EDUCATION

University of Southern California, Marshall School of Business

Los Angeles, CA

B.S. in Business Administration; Minor in Artificial Intelligence Applications

May 2029

Cumulative GPA: 4.00/4.00

Relevant Coursework: Financial Accounting, Microeconomics, Organizational Behavior and Leadership, Business Statistics

WORK EXPERIENCE

Onereach.ai

Denver, CO

Business Development Intern

June 2026 - September 2026

- Analyzed client priorities across 300+ enterprises in healthcare and insurance verticals to identify company tool use cases
- Developed marketing on agentic orchestration's usage across vendor platforms, increasing outreach engagement by ~15%
- Conducted 1200+ outreach touchpoints, connecting prospective enterprise contacts with company leadership for meetings

Berkman Woods

Tulsa, OK

Private Equity Intern

February 2026 - May 2026

- Screened 40+ CIMs against investment criteria, flagging ~20% as priority opportunities and presenting findings to partners
- Built company memorandums on 5+ acquisition targets by researching industry dynamics to support the valuation process
- Updated pipeline lists tracking 30+ targets, adding company details, financial notes, and deal status weekly to stay updated

StudyAP

San Jose, CA

Co-Founder

August 2023 - May 2025

- Led business strategy and pilot programs for an AI-powered study tool, driving adoption across 1400+ active student users
- Delivered classroom demonstrations across multiple schools to introduce StudyAP, explain features, and increase adoption
- Pitched product to 5+ investors and industry professionals, translating feedback to various product roadmap improvements

LEADERSHIP AND INVOLVEMENT

Trojan Venture Partners

Los Angeles, CA

TVPortfolio Analyst

September 2026 - Present

- Conducted weekly investment analyses evaluating 10+ public and private companies from a buy-side investor perspective
- Built DCF, LBO, public comparison, and three-statement models to analyze target companies across 5+ different industries
- Synthesized market trends and management quality into 10+ investment recommendations for all the companies reviewed

Trojan Investing Society

Los Angeles, CA

Leaders Program Member

February 2026 - Present

- Selected for TIS Leaders Program, completing weekly technical and behavioral training focused on recruiting preparation
- Received resume reviews, mock interviews, and mentorship from upperclassmen to build a stronger foundation in finance
- Attended speaker events and small group sessions while developing technical skills and relationships for recruiting success

Alpha Kappa Psi

Los Angeles, CA

AZ13 Investment Banking Program

February 2026 - May 2026

- Completed a 10-week investment banking bootcamp, participating in professional networking events and mock interviews
- Built technical foundations in accounting, enterprise value, valuation, M&A, and LBOs through weekly banking meetings
- Constructed three-statement financial models to support DCF valuations, reinforcing my core technical modeling abilities

USC Global Investment Society

Los Angeles, CA

J-Board Member; External Operations

October 2025 - May 2026

- Delivered personalized outreach to 20+ industry professionals to coordinate speaker participation for Investor Series event
- Sat in on 2 speaker planning meetings, recorded notes, and sent follow up summaries to keep parties constantly aligned
- Managed outreach pipelines of 50+ contacts by organizing the list, tracking responses, and coordinating speaker logistics

SKILLS AND INTERESTS

- **Skills:** Microsoft Office Suite (Excel, PowerPoint, Word), Mandarin (Native Proficiency), Basic Financial Modeling
- **Interests:** Golf, TV Shows (Game of Thrones), Video Games (Brawl Stars Top 2 NA), Thought Experiments