

ALEX MORGAN

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EDUCATION

Selective Liberal Arts College

Candidate for Bachelor of Arts in Economics, Minor in Computer Science

GPA: 4.00/4.00, College Scholar's List

Relevant Coursework: Macroeconomics, Microeconomics, Calculus, Financial Accounting

Independent High School

High School Diploma

GPA: 4.00/4.00, Top of Class Award, Academic/Athletic Scholarship

Activities: Varsity Baseball, Varsity Track, Investment Club, Food Club

Boston, MA

May 2028

San Francisco, CA

June 2022

EXPERIENCE

Private Equity

Intern

New York, NY

2025-Present

- Managed month-to-month accounting entries and reconciled funds across 100+ companies, improving financial accuracy and reducing discrepancies in support of strategic initiatives
- Managed a \$70M funding account by evaluating investor allocations, coordinating additional funding requirements, and ensuring accurate account balancing.

Local Service Business

Owner / Co-Founder

Toronto, ON

2020-Present

- Launched and grew home-services business, leveraging direct sales to acquire 500+ customers
- Manage accounting, supply chain, scheduling, and daily operations through Excel
- Designed and executed digital and physical marketing campaigns using community platforms, signage, and business cards

Private Credit Firm

Intern

New York, NY

Summer 2025

- Researched sponsor-backed companies nearing debt maturities, identifying 50 potential refinancing targets
- Leveraged market intelligence tools for targeted data sourcing and company analysis
- Built structured Excel database and presented PowerPoint report summarizing findings and private credit market update to senior leadership

Real Estate Technology Company

Intern

Boston, MA

Summer 2024

- Researched patent infringement case by analyzing documentation and industry practices to identify supporting evidence
- Updated aspects of company website using WordPress and supported SEO initiatives to improve online visibility

LEADERSHIP AND ACTIVITIES

Varsity Women's Baseball Team

Student-Athlete; Member of Leadership Group

Boston, MA

Sept. 2024-Present

- Devote 30+ hours per week to travel, practices, team meetings, training, and games
- Balance rigorous athletic commitments with full academic course load and recruiting preparation

Youth Mental Health Fundraiser

Founder

Boston, MA

2023-2024

- Led fundraising and awareness campaign to support local youth mental health services
- Raised \$3,000+ in donations, improving access to free programming and supporting program continuity

Investment Club

2022-2025

Boston, MA

- Co-led weekly meetings for 20+ members covering stock market fundamentals, portfolio management, and current financial events.
- Researched publicly traded companies and facilitated stock pitch discussions using financial statements and valuation metrics.

HONORS AND AWARDS

Academic/Athletic Scholarship, 2021; Community Award, 2023 & 2024; Baseball League Champion, 2023 & 2024

ADDITIONAL

Skills: Microsoft Office Suite; Excel; PowerPoint; Public Speaking; Basic Statistical Analysis

Interests: Personal Investing; Fitness; Travel; Food; Fishing; Cooking