

LLOYD
Address 1 | Address 2
Phone | School Email

EDUCATION

- 2007-present **KELLOGG SCHOOL OF MANAGEMENT** Evanston, IL
NORTHWESTERN UNIVERSITY
Candidate for Master of Business Administration degree, June 2009
- Intended Majors in Marketing Management and Management & Organizations
 - Selected, Panels Committee (B2B Segmentation) for Kellogg Marketing Conference
 - Selected, Humor Editor for *The Merger*
 - Elected, Section Board Representative
 - Member, Marketing Club and General Management Club
- 1997-2000 **THE WHARTON SCHOOL** Philadelphia, PA
UNIVERSITY OF PENNSYLVANIA
Bachelor of Science in Economics, Cum Laude, December 2000
- Concentrations in Marketing and Finance; Minor in French; GPA 3.6 / 4.0
 - Lyon, France – Full semester abroad at Lyon Université II and EM Lyon Business School
 - Wharton Ambassadors Club – Developed agenda designed to introduce participants to faculty

EXPERIENCE

- 2003-2007 **NEW YORK LIFE CAPITAL PARTNERS** New York, NY
Private equity firm managing \$6.1 billion for New York Life Insurance Company and third-party clients
Associate, 2005-2007
Analyst, 2003-2005
- Managed cross-functional team of investment professionals and foreign currency experts to persuade CIO to pursue \$45 million new market opportunity for South Africa-based private equity funds
 - Identified key insight about the importance of networks in Asian private equity market that was used by senior investment professionals in decision to commit \$40 million to new fund
 - Fulfilled internal constituents' need for increased accuracy by collaborating with audit department to invent innovative quarterly earnings estimation process that NYLCP adopted
 - Examined and uncovered investors' needs, NYLCP's position in the market, and general industry trends to evaluate opportunity for launching new product (\$1 billion fund)
 - Developed and distributed new product that communicated NYLCP due diligence process to investors who had little private equity experience
 - Analyzed quantitative and qualitative metrics to create investment committee memos leading to more than \$890 million of investments in the United States, Europe, Asia, and South Africa
 - Received accelerated promotion from Analyst to Associate after two years
- 2001-2003 **CIBC WORLD MARKETS** New York, NY
Investment Banking Analyst, Leveraged Finance/Financial Sponsors Coverage Group
- Coordinated (as lead analyst) sell-side advisory and subsequent financing for largest LBO in Canadian history (\$1.9 billion); winner of *Buyouts Newsletter* 2002 Large Market Deal of the Year
 - Led cross-functional teams of senior management, co-lenders, and attorneys to launch a consumer products retailer's successful \$150 million subordinated debt offering
 - Analyzed retail sales data to create presentations recommending client select CIBC as advisor in sale of leading branded bicycle manufacturer
 - Published bi-weekly "high yield market update" which was utilized by hundreds of Canadian investment bankers to understand current marketplace issues
 - Constructed customized projection models for diverse transaction scenarios on companies' profitability, capital structure, credit ratings, and sponsor returns that influenced credit committee's decisions

ADDITIONAL DATA

- Avid crossword puzzle solver; co-founded the only company to sell crossword puzzle-themed products through a website (www.puzzleprezents.com) and direct-to-consumers
- Assembled diverse investor group to purchase 22.0% of Rubbersidewalks, Inc.; currently serve as Board Observer alongside CEO, VP of Marketing, controller, and other investors
- Enjoy traveling to exotic locations (e.g., Cuba), playing competitive poker, and participating in sports