

# Douglas M. Kletter

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## EDUCATION

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**University of Maryland, College Park, Honors Program** **GPA – 4.00**  
Robert H. Smith School of Business: **Bachelor of Science, Finance** College Park, MD  
College of Behavioral and Social Sciences: **Bachelor of Arts, Economics** Expected: May 2012

- Dean's List, All semesters
- J. Williard and Alice S. Marriott Foundation Fellows Fund Scholarship, Rose and Robert Cohen Scholarship

## WORK EXPERIENCE

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**Credit Suisse Asset Management** New York, NY  
*Summer Analyst* June 2011 – Present

- Research and analyze institutional client portfolios to help implement strategic investment opportunities
- Create new strategies to effectively target untapped client market and augment the investment pipeline
- Manage a team of five interns to develop a strategic position and product for entrance into the private equity real estate market
- Develop a deep understanding of CSAM's product line including secondary private equity and customized funds

**Lemna Senbet Fund** College Park, MD  
*Portfolio Manager* May 2010 – Present

- Selected as 1 of 12 students to manage a \$700,000 endowment fund for the R. H. Smith School of Business
- Make investment decisions based on qualitative and quantitative analyses using DCF and multiples valuations
- Responsible for managing 10 analysts and compiling weekly market, economic, and industry reports

**Northwestern Mutual Financial Network** Annapolis, MD  
*Financial Representative* June 2010 – March 2011

- Analyzed personal, business, and estate markets to provide clients with investment and financial planning advice
- Developed deep client relationships to seamlessly address their changing needs
- Produced the highest amount of insurance premiums and investments of all Maryland interns

## LEADERSHIP & ACTIVITIES

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**SmithPeers: An Undergraduate Mentorship Cooperative** May 2011 – Present  
*Executive Director*

- Lead and collaborate with four other board members to design and implement the business school's first mentor program
- Communicate program progress and initiatives with the Office of Career Services leadership through monthly board meetings
- Develop and implement long-term goals by facilitating and leading discussions on strategic initiatives amongst board members
- Mentor young undergraduate peers by sharing personal experiences and providing career advice

**University of Maryland Financial Services Fellows Program** August 2010 – May 2011  
*Member*

- Competitively selected from UMD finance students
- Attend specialized classes focused on providing experience within the finance industry
- Regularly attend CEO @ Smith speaker series as well as other invitation-only Finance Fellows events

**University of Maryland Club Baseball Program** January 2009 – February 2010  
*President*

- Directly supervised and collaborated with Vice President, Treasurer, Secretary, and Fundraising Chair
- Led the development of the 2009-2010 season funding proposal that resulted in a \$26,000 budget
- Oversaw day to day operations for the entire team including allocating and dispensing budget
- Directed successful fundraising effort that raised over \$5,000 in one semester

## PROFESSIONAL DEVELOPMENT

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**2011 8th Annual Wikler Case Competition** April 2011

- Competed in a valuation-based case study using discounted cash flow, multiples, and LBO analyses

**Wall St. Training Seminar - Merger & LBO Modeling | Core Financial Modeling** April, January 2011

- Designed and analyzed merger & acquisition and leveraged buyout models using Microsoft Excel
- Integrated financial statements to construct and examine discounted cash flow and multiples valuations

**Study Abroad: United Arab Emirates** December 2010 – January 2011

- Obtained first-hand exposure to prominent Middle Eastern business and culture
- Met with executives from top companies to learn about the different business environments of the region

### Professional Licenses

- FINRA Series 6: Investment Company Products/Variable Life Contracts Representative Exam November 2010
- NASAA Series 63: Uniform Securities Agent State Law Examination December 2010

## ADDITIONAL INFORMATION

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### Volunteer Work

- Primannum Honor Society, UMD Chapter January 2009 – Present
- Veselich Training & Consulting Workshop October 2010