

Zach Zapien

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PROFESSIONAL SUMMARY

Technically-skilled finance professional with experience supporting investment operations for a multi-fund small business investment company (SBIC), with strengths in automating processes and creating tools to enhance portfolio monitoring.

PROFESSIONAL EXPERIENCE

NorthCoast Mezzanine, Minneapolis, MN

A multi-fund SBIC with \$690M+ AUM across three funds providing debt and equity capital to lower middle-market companies

Analyst

June 2023 - Present

- Support an 8-person investment team across 60+ portfolio investments with reporting and data management
- Primary coverage for 13 equity only investments
- Save 170+ hours of work per year by designing and implementing automated processes with python and vba to reduce valuation preparation time down from 5 days to minutes.
- Save 40+ hours of work per year by developing a lightweight ETL tool using a computer vision model trained to gather industry benchmarking data from a dynamically generated website for comparative analysis
- Log 1,000+ historical communications with detail in minutes by combining automated email retrieval and an AI tool tuned for the task
- Process monthly financial statements and prepare quarterly valuation models for investment committee review
- Research and due diligence support for new investments
- Maintain comprehensive sponsor database with 700+ private equity firms
- Support marketing communications including website updates, CRM management, and email campaigns

Private Equity Intern

June 2022 - June 2023

- Initially selected for summer program and retained for extended internship based on strong performance
- Supported marketing communications, website updates, and contact database management
- Assisted with the internal reporting database migration to Cobalt PE portfolio management software
- Learned core concepts about investment analysis, valuation, and economics for private equity deals
- Completed the Adventis financial modeling course specializing in LBO analysis

SKILLS

- Financial valuation and analysis
- Data visualization and reporting with SQL Databases
- Leveraging AI and online research to learn new technical skills often and efficiently
- Proficient use of Python, SQL, Visual Basic, Bash, TypeScript, CSS, Node.js, Next.js
- API integrations, batch file processing, web scraping, *Git*, *Docker*, email automation, and data centralization
- Programming applications for niche use cases in private credit/equity
- Build and configure applications, web servers, and a PBX server
- Strong communication, social, and idea generation skills, conversational Spanish

EDUCATION

University of St. Thomas, St. Paul, MN

September 2019 - May 2023

Bachelor of Arts, Major: Finance

Related Courses: Computer Science I/II, Advanced Finance, Core Finance, Accounting I/II, Calculus I/II, Statistics

Projects: Aristotle Fund Encore Wire Stock Pitch, NVIDIA Stock Pitch, Financial Modeling Project

Aristotle Fund Portfolio Manager

June 2020 - May 2023

- Monitored and managed an equity portfolio of \$10M+ on a team of graduate and undergraduate students
- Conducted in-depth research and valuations for public companies using complex financial modeling and analysis, followed by an investment pitch
- Performed a 5-year historical investment decision analysis for companies pitched by student fund managers

INTERESTS

- Fitness, programming, entrepreneurship, biking, guitar, snowboarding, fishing, hunting, cooking, creative projects