

Henry Fuller

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EDUCATION

University of Massachusetts Amherst, Isenberg School of Management

Amherst, MA

Master of Finance | Alternative Investment Track

Candidate, July 2026

- Cumulative GPA: 3.85; Relevant Coursework: *Fixed Income, Applied Python, Chartered Financial Analyst Review Course*
- Bachelor of Business Administration in Finance | Financial Analyst Concentration* *May 2025*

CASE COMPETITION

FHLB Affordable Housing Development Competition

February 2025 – April 2025

- Placed 2nd out of 20 groups against graduate students of Finance and Architecture teams ranging from Harvard to MIT
- Managed 4-person finance team and used current tax codes to write a functioning pro-forma to build staff housing in Jay Peak

PROJECTS

Real Estate Financial Modeling & Investment Analysis | *Value-Add Pro-Forma Modeling*

Fall 2025

- Modeled the financial returns for a proposed \$97 million acquisition of a 130-unit multifamily property in NYC, developing a 3-year value-add renovation business plan
- Built a dynamic operating pro-forma, underwriting assumptions for rental growth, vacancy, and credit loss to project NOI and cash flows for 5-year and 10-year hold periods

Fintech Equity Research Project | *Public Company Deep Dive*

Fall 2025

- Sourced and analyzed data from SEC filings (10-K, 10-Q) and Bloomberg to benchmark the company's financial scale and market share against peers and traditional incumbents
- Synthesized findings on regulatory risks and market position into a final investment thesis and presented recommendations in a 16-minute formal presentation to a panel

EXPERIENCE

Outsourced Financial Strategies

Needham, MA (Remote)

Financial Analyst

February 2026 – Present

- Perform financial reporting, variance analysis, and KPI tracking to enhance operational visibility and performance mgmt.
- Build financial models and dashboards, conducting ad hoc analyst to directly increase strategic growth and pricing initiatives.
- Partner directly with business owners and leadership teams delivering fractional CFO services, providing analysis and growth

Cambridge Savings Bank

Waltham, MA

Retail Banking Intern

May – August 2025

- Conducted competitive market analysis on deposit rates, loan prices, and promotional strategies benchmarking against regional and national banks to identify revenue optimization opportunities
- Assisted in financial modeling for deposit growth strategies, analyzing impact of recent interest rate changes on retention
- Developed client facing material to communicate rate changes and product offering enhancing customer engagement
- Supported cross functional teams such as small business units to contribute to data- driven decision making

Ignite XL

Remote

AI-Powered VC Deal Sourcing Intern

January – August 2024

- Conducted research and evaluated early-stage start-ups through the due diligence process in the longevity tech sector, collaborating with executive board members to assess alignment with IgniteXL's investment thesis
- Designed an investment summary document presenting key information in a live pitch to company leadership and potential investors, resulting in the successful ownership investment of HydroStasis in seed funding of \$100k
- Demonstrated effective time management by attending and participating in daily meetings and discussions, facilitating communication with internal team members and various company partnerships

Salem Five

Danvers, MA

Retail Banker

June – August 2023

- Actively engaged with Fiserv system to consistently track and document real-time threats, suspicious activities, or counterfeit currency while using DNA, Nautilus and Excel databases for all utilities

EsportScholar

Boston, MA

Business Development Intern

June – August 2022

- Collaborated with the Chief Financial Officer finishing successfully with 25 new leads and expanding to 5 new districts.
- Lead 40+ sales calls to assigned school districts by combining Census and Esports Research data to promote coordination with management, resulting in an increase in student academic achievement and productivity

SKILLS & CERTIFICATIONS

Technical: Microsoft Excel, Word, and PowerPoint; Google Slides, Docs, and Sheets; Python; Hootsuite; AI-Certified

Certifications: CFA Level I (Expected Feb 2026); UMass Real Estate Certification (Argus Certified); Upon MF completion CAIA Level 1 Exam Waived; Citi Investment Banking Job Simulation (Forage); Intermediate Python for Finance