

## LUCAS ROSS GOBBI

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### EDUCATION

FORDHAM UNIVERSITY, Gabelli School of Business, New York, NY Aug 16 – Dec 17  
**MS in Global Finance, GPA 3.8**

- Leadership Position: Board Member of the Finance Society
- Coursework: Credit Management, Emerging Markets, Financial Analysis & Valuation, Financial Modeling, Fixed Income, Global Finance, Investment Banking, M&A and LBO, and Real Estate Capital Markets

UNIVERSITY OF SOUTH CAROLINA AIKEN, Aiken, SC Aug 10 – Dec 14  
**BS in Business Administration - Accounting and Finance, GPA 3.7**

- Leadership Positions: Tennis Team Captain with a full tennis scholarship and Member of the NCAA Student-Athlete Advisory Committee
- Honors and Awards: earned Presidential Honor Roll (NCAA) and Student-Athlete Leadership awards

### EXPERIENCE

HSBC SECURITIES INC., New York, NY Jun 17 – Aug 17  
**Debt Capital Markets Analyst**

- Conducted pre-market analysis daily for the HSBC DCM Global Team, including global asset levels, LatAm bond markets, economic data, and news driving the markets
- Participated in bond pitches with bond pricing, presentation drafting, marketing materials, comps, financial research, deal reviews, weekly market update and company briefings
- Developed financial analysis and modeling for potential credit rating changes
- Interacted with different teams (e.g. Liability Management and Syndicate) to finalize bond pitches

LOB PLANNING GROUP, Purchase, NY May 16 – Dec 16  
**Wealth Management Analyst**

- Provided financial planners with technical analysis of the market for sector rotation using Dorsey Wright
- Executed stock screening of over 7,000 growth stocks weekly using technical and fundamental data, and decreased stock screening and selection time by 50% through automation
- Assisted meetings with reporting using LPL's proprietary tools (Portfolio Manager), and eMoney
- Communicated with clients, wholesalers and the company's consultant

JOHN HANCOCK FINANCIAL NETWORK, New York, NY Oct 15 – Dec 15  
**Wealth Management Intern**

- Assisted financial advisor in developing investment strategies and creating different allocations using Morningstar for financial research
- Developed different models of cash flows for retirement plans
- Communicated with high-net-worth clients on their portfolio needs

BEACH POINT CLUB / SPORTIME HARBOR ISLAND, Mamaroneck, NY May 12 – Dec 15  
**Tennis Camp Director / Senior Tennis Professional**

- Coordinated private and group lessons for children and adults while engaging with members
- Led a team of 10 assistants, created and managed activities for more than 100 children and 10 assistants, holding weekly staff meetings to go over lesson plans, drills, and workouts for the summer camp
- Recruited, hired and trained tennis camp assistants

### ADDITIONAL

- Certifications: CFA Level 2 Candidate (June 2018)
- Computer: Microsoft Office; Bloomberg Terminal
- Languages: fluent in English, Portuguese and advanced knowledge in Spanish
- Tennis Career: Brazilian National Champion; Achieved ranking #1 in Brazil and #3 in South America
- Undergraduate and graduate studies fully self-funded
- Interests: tennis, soccer, psychology, and travel