Carter Fozard

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EDUCATION

University of Arizona, Eller College of Management — **Tucson, Arizona**
Bachelor of Science in Business Administration — *Expected May 2028*

- **Major:** Finance
- **GPA:** 4.0/4.0
- **Honors:** Arizona Distinction Tuition Scholarship | 4x Dean's List with Distinction | UA Bookstore Scholarship

PROFESSIONAL EXPERIENCE

Barclays — **New York, New York**
Incoming Investment Banking Summer Analyst — *June 2027 – August 2027*

Valuation Research Corporation — **Philadelphia, Pennsylvania**
Financial Reporting Intern — *June 2026 – August 2026*

- Performed and presented an enterprise valuation using income and market approaches with other supplemental models
- Supported engagements through earn-out valuations, customer attrition analyses, and other project-specific deliverables
- Developed company profiles covering operations, customers, technology, and key industry trends for valuation reports

Drachman M&A — **Tucson, Arizona**
M&A Intern — *November 2025 – Present*

- Update and organize client financial information for active client engagements involving asset sales valued at $300mm+
- Support the execution of live M&A transactions through preparation of engagement letters, NDAs, CIMs, and VDRs
- Gain exposure to the full transaction process by shadowing senior bankers on key ongoing deal mandates and client calls

Eller Endowment Fund — **Tucson, Arizona**
Financials Sector Analyst — *November 2025 – Present*

- Research potential investment opportunities within the financials sector to grow a $110,000 student-led endowment fund
- Engage in weekly meetings to evaluate equity pitches and vote on buy/sell recommendations, guiding portfolio decisions
- Monitor fund holdings and market trends to identify emerging risks and support informed portfolio management efforts

Little Lion Investment Fund — **State College, Pennsylvania**
Chief Marketing Officer, Stock Analyst — *August 2022 – May 2023*

- Student-managed long-only fund that outpaced the S&P 500 index, overseeing a portfolio valued in excess of $150,000
- Constructed Amazon stock reports and recommended buy/sell/hold calls using both fundamental and technical analysis
- Assisted in creating and presenting a yearly overview of the fund's performance for the annual investor conference event

LEADERSHIP EXPERIENCE

Wall Street Scholars Program — **Tucson, Arizona**
Associate, Investment Banking Track — *October 2025 – Present*

- Accepted as 1 of 12 sophomores for a highly competitive and intensive investment banking preparatory training program
- Undergo rigorous mock interviews, detailed lectures, and direct mentorship to prepare for a career in investment banking
- Maintain strict attendance, complete weekly quizzes, and consistently meet all program performance metrics and goals

Delta Sigma Pi Professional Fraternity — **Tucson, Arizona**
Professional Activities Committee, Active Brother — *March 2025 – Present*

- Selected as 1 of 31 from 150+ strong applicants to join one of the most nationally recognized chapters of Delta Sigma Pi
- Awarded Outstanding Chapter of the Year, recognizing the top overall chapter out of 300+ nationwide organizations
- Review our new members' resumes and cover letters, giving constructive feedback on formatting, content, and clarity

ACTIVITIES & INTERESTS

Activities: Eller Make a Difference Day Volunteer | Junior Achievement Day Volunteer | The 3000 Club Volunteer
Interests: Ancient History Battle Documentaries | Arizona Basketball | Fantasy Football | Health, Wellness, & Biohacking | Ice Hockey Goalie | International Traveling | Outdoor Paintball | Penguins Hockey | Playing Golf | Sci-Fi Fantasy Movies | Settlers of Catan | Skiing | Space | Steelers Football | Synth Music | The Flash TV Series | Tron: Legacy | Weight Training