

# Jenny Zhu

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## EXPERIENCE

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### Perella Weinberg Partners

New York, NY

*Investment Banking Associate – FinTech Group*

March 2022 – Present

- Advise corporates and sponsors on M&A and strategic decisions across fintech, payments, SaaS, and digital assets, partnering closely with product, strategy, legal, and finance leaders
- Build integrated operating models and lead high-velocity strategic, diligence, and valuation analyses, applying rigorous modeling and pattern recognition across complex data to arrive at clear, defensible conclusions
- Synthesize incomplete and conflicting information into recommendations for clients, maintaining conviction under evolving deal dynamics
- Manage analysts and own end-to-end workstreams – trusted cultural and client-facing leader; regularly selected by senior bankers and HR to represent the firm, shape interview frameworks, and evaluate candidate judgment and fit

### Selected Transaction Experience:

- Advisor to Ripple on its \$500M strategic investment led by Fortress Group and Citadel
  - Developed and spoke to investor materials & strategic messaging for T1 investors
  - Partnered across corporate teams on diligence, managing evolving expectations while synthesizing information streams
  - Led financial model, including valuation sensitivities and investor returns analyses
- Advisor to PayPal on the divestiture of Happy Returns to UPS
  - Drove full financial model, including carve-out modeling and KPI definition, while refining deal perimeter with corporate development and finance leadership
  - Provided long-term client support on strategy and additional potential acquisitions across sectors
- Advisor to Xpansiv on its \$525M capital raise led by Blackstone
- Advisor to Debtors of FTX Chapter 11 Bankruptcy

### Broadhaven Capital Partners

New York, NY

*Investment Banking Analyst – FIG & FinTech*

July 2021 – March 2022

- Produced client-ready materials, financial models, valuation work, and industry research to support M&A and capital raising mandates across financial services and financial technology
- Coordinated due diligence, synthesizing insights from management, experts, and data rooms to drive transactions
- Selected Transaction Experience: Advisor to Franklin Templeton for \$1.75B acquisition of Lexington Partners; Advisor to Redline Trading on its sale to Pico

### Lazard Frères & Co.

New York, NY

*Investment Banking Summer Analyst – Restructuring*

June 2020 – July 2020

- Performed benchmarking analyses and compiled research to support deal teams; completed a capstone project involving valuation and presentation of strategic alternatives for a consumer company
- Selected Transaction Experience: Advisor to Pyxus for \$400M debt restructuring process; Advisor to Valaris for \$7.1B debt restructuring process

### Legg Mason

Stamford, CT

*Global Fiduciary Platform Intern*

June 2019 – August 2019

- Performed detailed analysis of fund expenses to assist in compiling required SEC reports; consolidated and organized data in Excel to implement new processes for monthly executive Board Reports
- Researched and reconciled contractual fee rates, working with Legg Mason clients to track changes

### U.S. House of Representatives – Office of Congressman Espaillat

New York, NY

*Intern*

June 2018 – July 2018

- Researched and organized performance data for District 6 New York public schools, employing Excel to deliver reports on constituent status; delivered reports on policy issues to provide media talking points for the congressman

## EDUCATION

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### Columbia University, Columbia College

New York, NY

Bachelor of Arts in Financial Economics, Concentration in History

May 2021

- GPA: 3.9/4.0 | SAT: 2330/2400
- Honors: Dean's List, Cum Laude Society
- Activities: Editor in Chief of Bwog Student News, Resident Adviser, Board Member of Columbia University Against Gun Violence, VP Social Standards of Delta Gamma Sorority, Member of Columbia Undergraduate History Council

## ADDITIONAL SKILLS

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**Skills/Languages:** Proficient in Mandarin; MS Word, Excel, PowerPoint, Outlook; HTML/CSS, WordPress, Adobe Suite

**Interests:** Mat Pilates Instructor, Secondhand / Fashion Resale, Amateur Cooking & Baking, Reading, NBA Basketball