

# Harlem Gleichman

Investment Banking Vice President

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OR 97330

## Education

### Bachelor of Science in Finance at University of Oregon

Sep 2011 - May 2015

I have learned how to manage money, how to invest, and how to save.

## Links

[linkedin.com/in/harlemgleichman](https://www.linkedin.com/in/harlemgleichman)

## Skills

Financial analysis

Financial modeling

Excel

PowerPoint

Negotiation skills

Communication skills

## Languages

English

German

## Hobbies

Golf

Basketball

Tennis

## Employment History

### Investment Banking Vice President at Umpqua Bank, OR

May 2022 - Present

- Led a team of 4 investment bankers in providing analysis and advice to clients on mergers & acquisitions, capital markets transactions, and other strategic initiatives.
- Arranged \$1.2 billion in financing for client's acquisition.
- Advised client on \$650 million divestiture resulting in 30% premium to market price.
- Issued over \$3 billion in debt and equity securities for various corporate clients.
- Led successful sale of regional bank for \$4.5 billion representing a 25% premium to book value.

### Associate Investment Banking Vice President at KeyBank, OR

Aug 2019 - Apr 2022

- Led a team of 4 analysts in the due diligence process for a \$600 million acquisition, resulting in the successful completion of the deal.
- Managed and grew a portfolio of 15 clients, generating \$2.4 million in revenue.
- Developed investment banking relationships with 3 major banks which resulted in increased business opportunities.
- Was responsible for originating and executing 10 transactions totaling over \$1 billion.
- Achieved top marks in customer satisfaction surveys 9 out of 12 months.

### Analyst Investment Banking Vice President at JPMorgan Chase Bank, OR

Jul 2015 - Jun 2019

- Led a team of 4 analysts in providing comprehensive analysis on potential investments for the bank, which resulted in an increase of successful investment pitches by 20%.
- Conducted extensive research and analysis on target companies across various industries, with a particular focus on the technology sector. As a result of this work, was able to provide insightful recommendations to senior management that led to the bank investing in 5 tech startups that went on to be very successful.
- Negotiated and structured 3 complex deals totaling \$1 billion over the course of 6 months. These deals were successfully completed and generated significant profits for the bank.
- Managed a portfolio of 15 investments worth \$500 million and achieved annual returns of 12%.
- Actively participated in all aspects of due diligence process on potential investments, including reviewing financial statements, assessing business models, conducting market research etc. This work helped reduce risk associated with these investments and ultimately led to more profitable outcomes.
- Wrote regular reports evaluating performance of current holdings as well as making recommendations on whether or not to buy/sell certain stocks.