Timothy Riffe
M&A Financial Advisory | Investment Strategy | AI-Driven Financial Solutions
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Professional Summary

Highly skilled **M&A Financial Advisor** with a strong background in **investment banking, corporate finance, and AI-driven financial modeling**. Expertise in **mergers & acquisitions, due diligence, risk assessment, and financial structuring**. Adept at **leveraging AI, machine learning, and data analytics** to drive precision in valuation, deal execution, and investment decision-making. Proven ability to support **corporate acquisitions, private equity investments, and strategic financial planning**.

Core Competencies

- **Mergers & Acquisitions:** Deal Structuring, Due Diligence, Synergy Analysis
- **Investment Banking & Corporate Finance:** Financial Modeling, Capital Markets, Valuation
- **AI & Quantitative Finance:** Predictive Modeling, Risk Analysis, Algorithmic Trading
- **Private Equity & Venture Capital:** Deal Sourcing, Portfolio Management, Exit Strategies
- **Regulatory & Compliance:** SEC, FINRA, AML, Risk Governance

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Professional Experience

Unified Software Solutions – Bakersfield, CA

M&A Financial Consultant & AI Strategist (2021 - Present)

- Led **M&A deal analysis** using **AI-driven valuation models** and financial risk assessments.
- Designed **automated financial forecasting systems** to optimize deal pricing and investment returns.
- Conducted **market and competitive analysis** to identify strategic acquisition targets and synergies.

WorldQuant – Remote

Quantitative Research Consultant (2023 - Present)

- Developed **AI-powered investment models** to enhance **deal evaluation and risk-adjusted return forecasting**.
- Applied **deep learning techniques** to assess financial health and market positioning of M&A targets.

Morgan Stanley | Merrill Lynch | JP Morgan – Various Locations

M&A Financial Advisor & Investment Strategist (2013 - 2017)

- Managed **$35M+ in institutional investments**, providing **strategic financial advisory for acquisitions and divestitures**.
- Developed **custom financial modeling tools** to improve investment decision-making processes.
- Led **M&A advisory engagements**, identifying high-value acquisition opportunities for corporate clients.

Education

- **B.S. in Business Administration & Management – University of Phoenix (2017)**

Certifications & Licenses

- **FINRA Series 63 & 65 | SIE | Expired Series 7 & 66**
- **AWS Cloud Practitioner & AWS AI Practitioner**

Key M&A Financial Advisory Projects

✅ **AI-Powered M&A Valuation Model:** Built **machine learning-based valuation tools** to assess acquisition targets with **real-time market data**.
✅ **Automated Due Diligence Framework:** Designed **AI-driven financial risk assessment models** to streamline **due diligence processes**.
✅ **Private Equity Portfolio Optimization:** Developed **predictive analytics systems** to enhance **investment selection and exit strategy planning**.
✅ **Capital Markets Strategy Development:** Advised firms on **optimal capital structuring for acquisition financing and corporate growth**.
