

SOFIA RAMIREZ

INVESTMENT ASSOCIATE

CONTACT

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🏠 Chicago, IL

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SUMMARY

Investment Associate at a Chicago venture capital firm with 2 years of prior investment banking experience in technology M&A. Sources and screens seed and Series A deals, builds financial modeling and market maps, and writes investment memos with attention to detail and plain communication skills.

SKILLS

- Venture Capital
- Investment Banking
- Financial Modeling
- Valuation
- Due Diligence
- Discounted Cash Flow
- Excel
- PowerPoint
- Attention to Detail
- Communication Skills

EDUCATION

Bachelor of Business Administration

05/2023

University of Notre Dame

Notre Dame, IN

Finance

CERTIFICATES

Series 79 and Series 63

10/2023

FINRA

EXPERIENCE

Investment Associate

07/2025 - Present

Lakefront Ventures

Chicago, IL

Early-stage venture capital firm with a \$180M fund investing in B2B software.

- Evaluate **400+** startups a year and bring 25 to partner meetings with a written thesis.
- Build cap table and return models for 6 new investments totaling \$21M.
- Write investment memos covering market size, competition, unit economics and key risks.
- Track KPIs for 18 portfolio companies and prepare quarterly updates for limited partners.

Investment Banking Analyst

07/2023 - 06/2025

Wacker Drive Partners

Chicago, IL

Middle-market investment bank advising technology and services companies.

- Built merger and LBO models in Excel for **9** sell-side and buy-side mandates totaling \$1.1B.
- Drafted confidential information memoranda and PowerPoint management presentations for 5 sale processes.
- Managed data rooms with 2,000+ documents and answered buyer due diligence questions.
- Prepared valuation analyses using trading comps, precedent transactions and discounted cash flow.

Investment Banking Summer Analyst

06/2022 - 08/2022

Wacker Drive Partners

Chicago, IL

Summer analyst program before the full-time offer.

- Built trading comps for **3** software pitch books.
- Researched 150 potential buyers for a healthcare IT sell-side process.
- Updated transaction databases and league tables used by 12 bankers.