

Daniel Munoz, CVA

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SUMMARY

Bilingual financial services valuation analyst with experience in performing stock valuations of closely held operating businesses in the manufacturing, rail transportation, asset management, financial services, real estate, restaurant/bar, banking, management consulting, waste management and energy industries.

PROFESSIONAL EXPERIENCE

Business Valuation Group, Chicago, IL

Financial Services – Valuation Analyst

September 2017 – Present

- Provide a conclusion of value for small and mid-sized closely held businesses for various purposes such as estate tax planning, gift taxation, marital dissolution, third-party or related-party sale, and ESOP reporting compliance, etc.
- Conduct in-depth client, industry, and market research, while preparing narrative reports to support valuation analysis of enterprises with revenues ranging from \$1.0 million to \$1.0 billion.
- Design, improve, and implement valuation models, incorporating industry changes for discounted cash flow, market multiple, market transaction, leveraged protective put, and option pricing analyses.
- Analyze, normalize, and make proper adjustments to the financial statements, as well as build and analyze financial projections.
- Develop models and reports supporting lack of marketability discounts derived from restricted stock transactions used in lack of marketability conclusions by analysts in the firm.

APPLE, Chicago, IL

Customer Service – Product Specialist

July 2017 – September 2017

- Consistently exceeded sales goals; proven track record with overwhelmingly positive net promoter score.
- Worked face-to-face with customers to answer technical questions and understand and quickly solve their complex technical issues.

DePaul University, Chicago, IL

Residential Services - University Center Resident Adviser

August 2016 – August 2017

- Enforced building policy and performed conflict and crisis management for 1,700 residents.
- Lead, budgeted, and marketed 20 programs, consisting of academic and professional resident development.

CBRE, Chicago, IL

Property Management – Accounting Coordinator

December 2015 – August 2017

- Processed and posted invoices to the accounts payable and receivable general ledgers.
 - Reconciled invoices, departmental billings, vendor statements, cash receipts and journal vouchers.
 - Assisted Senior Accountant with various operations, including budget reconciliation and trial balance.
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EDUCATION

DePaul University, Chicago, IL

June 2017

Driehaus College of Business GPA: 3.7/4.0; Dean's List all Quarters

Bachelor of Science in Business Major: Finance

Student Finance Association Member

September 2015 – June 2017

International Business Seminar in Paris – Luxury Marketing

March 2017

Enrolled in Adventis' Financial Modeling Certification (FMC™) Program

CERTIFICATIONS; TECHNICAL SKILLS; LANGUAGE SKILLS

- Certified Valuation Analyst (CVA) November 2018
- Chartered Financial Analyst Candidate (CFA) Level II, Passed Level I (2019) June 2020
- Fluent in Spanish; Beginner knowledge of French
- Experienced in HTML, CSS, and SQL; Beginner in C++ and Python