Tristan Poul

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Education

Santa Clara University   Sep 2022 - Jun 2026
Bachelor of Science Economics
Minors: Management Information Systems, Concentration in Data Analysis
Notable Courses: Urban Issues Research Lab, International Finance, Econometrics and Data Analysis, Database Management Systems

Work Experience

Investment Banking Summer Analyst   Summer 2025
Evergreen Advisors | Columbia, MD
- Supported the banking team on the execution of sell-side and capital raise mandates, gaining a deeper understanding of the M&A process.
- Prepared CIM, teaser, three statement model, and target list for a case study client during an intensive 8-week program.
- Interfaced with senior deal team members to discuss topics such as valuation, deal structure, NWC, diligence, and SPA negotiations.

Consultant   Feb 2024 - Present
Santa Clara Consulting | Santa Clara, CA
- Delivering strategic consulting and market-based support to clients ranging from Fortune 500 companies to 2-person startups.
- Analyzing quantitative and qualitative data to provide professional advice to clients.
- Member of SCC's recruitment committee.

Financial Analytics Intern   Summer 2024
Align Technology | Santa Clara, CA
- Designed and implemented a pricing model from scratch, optimizing cost structures with projected savings of over $1 million annually for a new product launch.
- Led a data analysis project to examine trends in the time between orthodontic treatments, providing valuable insights into future sales.
- Oversaw the complete process of launching a new product, specifically working with my direct report to design a plug-and-play, multiple-scenario financial model.

Financial Advisory Intern   Summer 2023
Wells Fargo Advisors | Minneapolis, MN
- Conducted research and analysis of U.S. equities with a focus on client-based needs.
- Served senior advisors in reviewing and analyzing portfolios, including stocks, mutual funds, and private money managers.
- Attended meetings with asset managers, gaining valuable insights directly from top global investment management firms.
- Assisted senior advisors in evaluating mutual funds and money managers by comparing rankings with peer groups and analyzing asset allocation.

Projects

Co-Founder and Vice President of Santa Clara Quant   Jan 2024 - Present
- Created a platform for students interested in quantitative finance to explore quant-backed investment strategies and careers in QF.
- As Vice President, my duties are strategic planning and operational oversight of the organization.

Small Business LBO Model (Link)
- Built an interactive web-based simulator to model small business acquisitions under SBA 7(a) loan terms, with optional mezzanine debt, seller financing, and a revolver.
- Developed a downloadable Excel version that auto-syncs inputs from the site and calculates FCFE, IRR, and MOIC by exit year.

NFL Prediction Model (Link)
- Automated weekly pipelines to ingest and clean data from NFL APIs, Kalshi, and Polymarket.
- Trained Elo and logistic regression models to forecast win probabilities.
- Deployed predictions to a live dashboard comparing model outputs to multiple prediction markets.

Core Skills

Excel, Financial Modeling, Investment Analysis, Python, R, Machine Learning, SQL, Chess