

Sergio Romero

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EDUCATION

Baruch College/CUNY, Zicklin School of Business

New York, NY

Bachelor of Business Administration in Finance, Minor in Physics

Aug. 2025 - Expected Dec. 2027

Cumulative GPA: 3.8/4.0 | Major GPA: 4.0/4.0 | Dean's List (2025-2026)

Relevant Coursework: Principles of Finance & Accounting, Statistical Analysis in Economics, Fundamentals of Business Law

PROFESSIONAL EXPERIENCE

CEROS FINANCIAL SERVICES

New York, NY

Incoming Private Equity/Wealth Management Intern

Sep. 2026 - Present

- Selected to pitch to accredited investors for pre-IPO equity offerings by coordinating targeted outreach
- Set to build weekly market updates translating macroeconomic trends into forecasts and client-ready talking points
- Lined up to model a company's financials for an investment thesis capstone project on a potential public debut

MANGUSTA CAPITAL

New York, NY

Venture Capital Extern

Jun. 2026 - Present

- Leveraged Claude AI to research startups matching investment criteria, accelerating market research ~3x
- Evaluated 20+ Vertical AI startups across funding, execution, and technology, advancing 3 to further review
- Pitched high-conviction investment memo to the Principal, securing active watchlist status for a company

LEADERSHIP & CAMPUS INVOLVEMENT

CBRE CAPITAL MARKETS 101 FELLOWSHIP

New York, NY

Fellow

Aug. 2026 - Present

- Applied CRE capital markets concepts: capital stacks, debt/equity, deal structure with CBRE professionals
- Developing foundational knowledge of investment sales underwriting and asset class dynamics across CRE
- Analyzing CRE asset classes, cap rates, and underwriting metrics to evaluate property valuations

MANAGEMENT LEADERSHIP FOR TOMORROW (MLT)

New York, NY

Career Prep Fellow - Investment Banking & Finance

Mar. 2026 - Present

- Received 80+ hours of individualized coaching on interview prep, technical skills, and professional development
- Produced a research memo on Blackstone (BX), analyzing Q1 financial statements, capital deployment, analyst sentiment, and forecasted earnings trajectory to inform an investment recommendation
- Solved a UBS case study under a 30-minute constraint, leading team analysis and delivering a winning presentation

BARUCH WALL STREET CLUB

New York, NY

Accelerator Program Participant

Sep. 2025 - Present

- Selected as 1 of 100+ applicants for Baruch Wall Street Club's competitive Accelerator Program
- Delivered 3 weekly market briefings to 80+ club members on major index movements and drivers, including breaking down the "SaaS-pocalypse" for underclassmen with limited markets background
- Conducted Consumer/Retail sector deep dive, analyzing macro drivers, competitive positioning, and Chipotle's valuation, financial performance, and key risks

FARMINGDALE INVESTMENT CLUB

Farmingdale, NY

President

Jan. 2025 - Jun. 2025

- Expanded budget from \$1,000 to \$5,000, enabled by 70% growth of club membership year over year
- Organized 6+ speaker sessions and networking events, allowing members to break into the world of finance
- Spearheaded paper trading competition workshops, training members on stock fundamentals and market dynamics

PERSONAL INVESTMENT PORTFOLIO

Jan. 2021 - Present

- Analyzed 10+ company fundamentals via 10-K filings, driving portfolio allocation for targets with viable moats
- Built regression model analyzing Treasury yields and macro variables to assess drivers and guide portfolio decisions
- Built a portfolio monitoring application using Claude AI to track positions, benchmark performance, and company news, designed to be adaptable for use in a professional investment workflow

SKILLS & INTERESTS

Technical: Bloomberg Terminal, FactSet, Capital IQ, Microsoft Office (Word, Excel, PowerPoint, Outlook)

Certifications & Languages: Wall Street Prep (Financial Statement Modeling), Bloomberg Market Concepts (2025); Spanish

Interests: Entrepreneurship, ALPFA, UFC, Hiking, Sports Cars, Chipotle, Dogs