

# Joseph Rice

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Roslyn, NY

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## EDUCATION

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### Stony Brook University

May 2027

Bachelor of Science in Business Management; Concentration in Finance

Stony Brook, NY

- Awards: CAA Commissioner Honor Roll, Dean's List
- Relevant Coursework: Principles of Finance, Mergers & Acquisitions, Python for Finance and Economics

## EXPERIENCE

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### Netrex Capital Markets

June 2025 - August 2025

Summer Analyst

Melville, NY

- Supported an add-on acquisition of an MSP/MSSP provider by responding to 75+ pages of due diligence questions from 15+ lenders, breaking down supplemental data into clear, actionable insights
- Collected IOI terms and grid responses, creating a side-by-side Excel comparison for efficient sponsor review
- Compiled an organizational book including a deal timeline, lender list, and key diligence items to streamline sponsor communication

### Morgan Stanley

June 2024 - August 2024

Wealth Management Intern

New York, NY

- Executed a comprehensive group presentation on Alternative Investments, specifically focusing on Private Credit, presenting to 5+ senior management and executives; received positive feedback from 100% of attendees and enhanced understanding of investment strategies, gained presentation skills
- Optimized client management by leveraging Excel and Salesforce to analyze and organize data on 250+ high-net-worth clients, improving team efficiency and reliability
- Developed detailed analytics reports from Salesforce data, identifying lead activity trends and engagement patterns, directly contributing to 10+ client acquisitions

## Extracurricular Activities

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- **Stony Brook University Lacrosse Team**
  - Active junior NCAA Division 1 Player (Goalie)
  - Maintained strong academic standing while balancing a rigorous 25-hour weekly training schedule and an 18-credit course load
- **CFA Institute Research Challenge**
  - Spearheaded a 5-person team of student-athletes to produce a professional-grade equity research report for NANO Nuclear Energy, managing rigorous research deadlines alongside a full-time athletic and academic schedule
  - Technical Synthesis: Evaluated the feasibility of Small Modular Reactor (SMR) technology, translating highly technical engineering and regulatory hurdles into a digestible financial investment thesis

## Skills & Certifications

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**Technical Skills:** Microsoft Office Suite (Word, PowerPoint, Excel), Equities, Equity Derivatives, Investment Strategies, Alternative Investments, LBO Modeling, Market Research, Due Diligence, Debt Capital Markets

**Certifications & Training:** FINRA - Securities Industries Essentials (SIE), Breaking into Wall Street (BIWS)-Private Equity Modeling, Excel & VBA