

Alexis Huerta

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Education & Achievements

Colby College

Bachelor of Arts in Economics – (Financial Markets) & Latin American Studies | GPA 3.5

Waterville, ME

Expected May 2028

- Awards/Scholarships: QuestBridge Scholar (Full-Ride) | Lindsay Morehouse Scholarship (\$5,000)
- Relevant Coursework: Microeconomic Theory, Research Methods, Calculus I

Tuck School of Business at Dartmouth

Hanover, NH

Tuck Business Bridge Program

January 2026

- Selected as one of 150 students nationwide for an MBA-level Bridge Program; built a DCF valuation of Costco analyzing business fundamentals, competitive dynamics, and intrinsic equity value
- Led product development for Gifford's Ice Cream on a five-person consulting team; proposed ice cream flight offerings that leveraged existing brand partnerships, eliminated new R&D costs, and projected a 10–15% margin improvement

Professional Experience

Sapere Aude Consortium

New York, NY

Investment & Wealth Management Intern

June 2026 – August 2026 (Expected)

- Assigned to the Alts Liquidity Group, conducting investment research on alternative asset classes and liquidity solutions to support portfolio strategy across asset and wealth management mandates
- Authoring a 12–15-page research report on illiquidity premiums, to be published on the firm's website as investor-facing market insight on 401(k) allocation decisions

Project Destined

New York, NY

Real Estate Investment Intern

June 2025 – July 2025

- Underwrote 4 multifamily investment opportunities (\$3M–\$5M; 80–100 units, 700–800 sq ft/unit), modeling cash flow revenue potential, location, and operational cost to rank acquisition viability
- Presented cash flow models to program mentors in a case-study evaluation, with select models chosen for further investment consideration

BlackRock

Hudson Yards, NY

Senior Intern - Thematic Team (2024) | Intern – Thematic Team (2023)

July 2023 – August 2024

- Mentored a cohort of 5 interns on analytical and presentation technique, contributing to a final pitch recognized by senior team members for clarity and insight
- Delivered a client-facing presentation on SOXX ETF holdings, covering semiconductor market trends and performance to inform prospective investors' allocation decisions
- Constructed ETF portfolio allocations for client profiles ranging from \$100K to \$10M, aligning recommendations with risk-return objectives through analysis in Aladdin and Morningstar; presented allocation rationale to senior team members
- Benchmarked BlackRock ETFs against Vanguard equivalents under yield curve–driven interest-rate scenarios, modeling performance impacts across risk profiles and presenting differentiated recommendations to VPs and MDs

Extracurricular Experience

First Generation Investors at Colby College

Waterville, ME

President / Mentor

September 2024 – Present

- Developed and delivered a weekly financial literacy curriculum to a cohort of 20 first-generation students across 8-week semesters, achieving 100% practice-exam pass rates and increasing participant and mentor retention each semester

Colby Student Investment Association (CSIA)

Waterville, ME

Member

September 2024 – Present

- Developed an investment thesis on GE Aerospace through fundamental analysis and DCF valuation, with the recommendation selected for inclusion in the school's live portfolio

SEO Career

New York, NY

Alternative Investments Participant

September 2024 – Present

- Gained hands-on technical training in DCF, LBO, and three-statement modeling through Wall Street Prep

Skills & Interests

- **Certifications:** CFA Investment Foundations · Envestnet Institute on Campus ·
- **Financial Modeling:** Three-Statement Models · DCF · LBO · Comparable Company Analysis · Aladdin · Morningstar
- **Foreign Languages:** Spanish (Native Proficiency)
- **Interests:** Soccer (Liverpool FC, Bayern Munich) · Skateboarding · Rock Climbing · Cooking · AI and Markets