

SAMANTHA SOHAL

E: ssohal@wharton.upenn.edu | T: 416-906-1074

EDUCATION

The Wharton School, University of Pennsylvania

Philadelphia, PA

Master of Business Administration Candidate, Concentration in Real Estate

2021-2023

- Recipient of Henry and Marcelle Morgenthau Fellowship, GMAT: 740 (97th percentile)
- Relevant coursework: Argus training, real estate investments, real estate development

University of Western Ontario, Richard Ivey School of Business

London, Canada

Bachelor of Arts, Honors Business Administration

2009-2013

- Graduated with distinction, Dean's Honor List, Cumulative GPA 3.9/4.0

EXPERIENCE

AMAZON

Seattle, WA

Senior Product Manager Intern, US 3P Business (*received full time return offer*)

Summer 2022

- Developed business case and product strategy for a new third-party seller onboarding process, resulting in a projected increase of gross merchandise sales by 24%

SUN LIFE FINANCIAL

Toronto, Canada

Director, Partnerships, Strategy & Growth (*secondment*)

2021-2021

Director, Corporate Development

2019-2021

- Built the strategic investment (venture) program for Sun Life Financial, creating a framework for investing in early-stage companies across FinTech, InsurTech and Healthcare Technology (Series B - D)
- Led the evaluation and execution of venture and corporate M&A opportunities, including financial modelling, due diligence and transaction structuring, to prepare and present investment memorandums to the Executive team
- Cultivated relationships with senior executives across a range of industries to monitor market dynamics, originate commercial opportunities, and develop investment theses to advance Sun Life's strategic priorities
- Hired, trained, and mentored departmental colleagues, coaching junior staff on their professional development

Selected Transaction Experience:

US\$85 million acquisition of Pinnacle Care International

- Led the diligence process, including management meetings and third-party workstreams (e.g., legal, accounting), on a 3-person deal team
- Managed and oversaw associate's workstreams, including financial model, management meeting materials, and investment memos presented to Executive team and Board of Directors

C\$33 million Series B+ investment in Dialogue Health Technologies (Sun Life led)

- Led commercial and financial diligence, reconciling unit economics data pre- and post-signing of Sun Life's commercial relationship alongside the venture investment
- Built models to identify optimal investment structures and aid negotiations with management team and their advisors

Sale of Sun Life's sponsored markets insurance business

- Managed sales process alongside financial advisor, spearheading internal workstreams by conducting reverse financial and operational diligence on carve-out of group benefits business, evaluating data room, and preparing memo to Executive team

BANK OF CANADA (BoC; Central Bank)

Toronto, Canada

Senior Analyst, Financial Markets

2015-2019

- Led BoC analytical outputs published in the Financial System Review, on a range of subjects from housing markets to cryptoassets, and provided critical market briefings to Governing Council to help steer national policy decisions
- Co-authored a nationally published discussion paper, "Fintech: Is This Time Different?", assessing the potential impact of fintech innovations on the Canadian banking system
- Nominated for the BoC's innovation award for developing new analytical tools to examine developments in Canadian fixed-income, equity and fintech markets, allowing the BoC to better understand risks to the financial system

SCOTIABANK

Toronto, Canada

Investment Banking Analyst - Mergers and Acquisitions

2013-2015

- Performed extensive financial modelling and valuation analyses, carried out due diligence, industry and company research, and prepared client presentations to assist companies in the evaluation and execution of their strategic plans

ADDITIONAL INFORMATION

Community: Board Member of Supporting our Seniors, a not-for-profit that mobilizes volunteers to serve isolated seniors

Interests: Thrill-seeking activities, hiking and travel (visited 40+ countries) | **Work Authorization:** U.S. & Canada