

LAMBERT ZHANG

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration; Majors in Finance and Business Analytics

2022-2024

- Clubs and Fellowship: PE/VC (Head of International), Real Estate Club, and Wharton Admission Fellow
- GMAT: 740 (97th Percentile)

THE UNIVERSITY OF SYDNEY

Sydney, Australia

Bachelor of Commerce (Honors) in Finance and Accounting

2014-2017

- GPA: 3.8/4.0 (First Class Honors); Ranked 1st in graduating class
- Awards: Dean's List, Joye Prize in Finance (No. 1 in Class), Academic Merit Prize (Top 1%), and Honors Scholarship (Top 5%)

EXPERIENCE

CITIC PRIVATE EQUITY (*A \$30B private equity fund, 2023 PEI 300 ranking global No. 62*)

Beijing, China

Summer Investment Associate (Infrastructure Investment Team)

Summer, 2023

- Assessed the feasibility of potential privatization for a listed data center constructor by LBO

BANK OF AMERICA MERRILL LYNCH

Palo Alto, CA

Investment Banking Summer Associate (Tech Coverage Team, Full-time Return Offer Awarded)

Summer, 2023

- Space X's secondary private placement with \$150B valuation: Quantified total TAM for Space X, screened comparable comps, and researched 100+ market reports to facilitate valuation model buildup and investor presentation preparation

CEDARLAKE CAPITAL (*A \$4B growth equity fund founded by Morgan Stanley's ex-China head*)

Shanghai, China

Investment Associate (Investment Topics: Data Center, AI, Autonomous Driving, and Advanced Manufacturing)

2021-2022

- Evaluated 60+ opportunities in high-tech industry, conducted commercial diligence, created financial models, presented findings to Investment Committee (10+ initial bids, six interim bids, and four closed deals), and supported post-investment management

Selected Closed Investment Deals

- \$20M series C investment for Maxieye (level III autonomous driving company): Led end-to-end investment processes from deal sourcing, evaluation, and modeling to SPA negotiation, and identified three synergy areas worth \$5M with portfolio companies
- \$40M series A investment for ListenAI (AI-driven voice recognition system-on-chip fabless company): Initiated and developed a five-year financial model to assess investment returns under various operating cases by predicting AI chip's penetration rate

MONITOR DELOITTE (*A strategy and M&A consulting subsidiary of Deloitte Consulting*)

Shanghai, China

Senior Consultant (Top 5% Performer; Promoted to Consultant in 2019, Senior Consultant in 2021)

2017-2021

- Assessed AI's potential implementation in mobility space and developed a growth strategy for China's first and biggest car-connectivity service provider, mapping a tenfold increase in customer base from 1M in 2019 to 10M by 2025

Selected Mobility Technology and Lithium Battery Mergers & Acquisitions Deals

- Led regulatory and finance workstreams in due diligence for an NYSE-listed lithium battery components supplier to acquire an SZSE-listed lithium company's subsidiary for RMB 2.4 billion
- Provided buy-side advisory to facilitate post-diligence deal negotiation work to successfully sign a SPA under a \$205 million equity deal for a listed lithium raw material supplier on its acquisition of a leading Chinese private-owned lithium manufacturer

NEW INSPIRATION EDUCATION (*A tutoring and student advisory services firm*)

Sydney, Australia

Founder and Managing Director

2015-2019

- Founded educational services firm that employed 74 tutors from diverse backgrounds as a sophomore student, established four campuses, educated over 30,000 students in 4.5 years, and occupied ~35% of the total addressable market
- Grew company revenue by 20 times and realized 71% gross margins and 53% net margins while working on a part-time basis
- Sold ownership stake to an upstream competitor, creating the largest market player while retaining 90% of the team post-sale

ADDITIONAL INFORMATION

- Language and Skills: Mandarin (Native), English (Fluent); Proficient in Bloomberg and Capital IQ; CFA level III candidate
- Publication: Co-author of "Mind the Sovereign Ceiling on Corporate Performance," published in the *Journal of Corporate Finance*, vol. 75, Aug 2022, [publication link](#)
- Interests: Travel (road trips), stand-up comedy, wine & whiskey tasting, fishing, cooking