

Mickie Siebert

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EXPERIENCE

Heritage Family Trust

Investment Associate

New York, NY

September 2021 – Present

- Assess investment opportunities with external managers across public and private markets on behalf of a single-family office
- Conduct in-depth diligence on top tier private asset managers across buyout, growth equity, venture capital, private credit, distressed/special situations, natural resources, and real estate strategies to assess and pitch primary investment opportunities
- Analyze deal and fund level historical track records, at entry and exit operating metrics, value creation attribution, and other qualitative metrics and statistics to evaluate re-ups with existing private managers and potential new manager partnerships
- Analyze historical performance and run various risk and return analyses to evaluate hedge fund and public equity managers
- Engage in regular update calls and due diligence meetings with current and perspective external managers

Blackrock

Strategic Partners Analyst

New York, NY

June 2019 – August 2021

Strategic Partners Summer Analyst

May 2018 – August 2018

- Evaluated diverse portfolios of alternative investments for secondary transaction opportunities across asset classes and strategies, including leveraged buyout, venture capital, growth equity, real estate, and private credit
- Analyzed and underwrote GP-led transactions, asset and fund recapitalizations, and co-investment opportunities
- Built financial models and performed extensive valuation analysis to project fund and portfolio company performance based on fund financial statements, manager update reports and presentations, diligence calls, and independent research
- Assessed potential primary investments on behalf of Strategic Partners' primary advisory program client, and helped analyze and manage the portfolio, including preparing in-depth quarterly reporting materials and engaging in update calls
- Co-wrote investment committee memorandums and presented investment opportunities to senior executives at IC meetings

Wellington Management

Fixed Income Research Summer Analyst

Boston, MA

July 2017 – August 2017

- Solely responsible for performing in-depth research on the global beer industry, including constructing forward forecasting financial models and formulating recommendations for AB InBev, Heineken, and Molson Coors
- Presented analysis to senior management, portfolio managers, and investment grade fixed income team

EDUCATION

University of Pennsylvania

Bachelor of Science in Management; Dual Major in Finance & Management Consulting

Philadelphia, PA

August 2015 – May 2019

- GPA: 3.94 / 4.0
- Honors and Awards: Summa Cum Laude, University of PA Association of Business Alumni Award, Dean's Service Award, Presidential Scholarship Recipient, Dean's List (all semesters)
- Activities: Alpha Kappa Psi Professional Fraternity, BSM Major Ambassadors, Darwin Fenner Student Managed Fund, After School Newcomb Tutoring, Campus Services Advisory Board

Vienna University of Economics and Business

Exchange Student

Vienna, Austria

September 2017 – December 2017

Girls Who Invest

Summer Intensive Program Scholar

Philadelphia, PA

May 2017 – June 2017

- Selected as one of 60 scholars nationwide to participate in a rigorous 4-week program focused on core investment concepts and skills taught by Wharton Business School professors and investment professionals

EXTRACURRICULARS

Harris Family Alternative Investments Program

Investment Research Manager

Philadelphia, PA

May 2018 – May 2019

Equity Research Analyst

January 2018 – May 2018

- Published an investment research report as part of a highly-acclaimed securities research program, in which I visited headquarters, consulted management, generated cash flow and earnings models, and conducted independent research
- As an Investment Research Manager, I oversaw and managed two teams of equity research analysts, providing guidance and feedback on their reports and analyses, and helping facilitate understanding of modeling and valuation concepts

PERSONAL

- Interests: national parks, travel, running, exploring new restaurant and dessert places, puzzles and games, Top Chef