

Lavanya V. Neti

lvnet@wharton.upenn.edu | (510) 458-1665 | [LinkedIn](#) | [Website](#)

EDUCATION

University of Pennsylvania, The Wharton School

Philadelphia, PA

- *B.S. Summa Cum Laude*, GPA: 3.90/4.00, ACT: 34 Major: Finance and Statistics, May 2025
- *Honors*: Joseph Wharton Scholar, Beverly Virany Memorial Prize, Congressional Award Gold Medalist

EXPERIENCE

Wells Fargo

San Francisco, CA

Investment Banking Analyst - Technology Group

July 2025 - Present

- Built financial models, including public trading comparables, discounted cash flow, and leveraged buyout analyses to support client materials and internal discussions

Selected Transaction Experience

- Advised lender group on \$6.8B acquisition of a healthcare human-experience SaaS platform by a global experience-management provider, including a \$5.8B debt financing package
 - Built sources & uses, pro forma capitalization, and leverage/interest coverage sensitivities to size Wells Fargo's ~\$440M hold within the broader \$5.8B financing and assess covenant headroom
 - Benchmarked combined platform scale (41k+ healthcare organizations served) and data advantages vs. CX/HX and healthcare analytics comps to support credit and strategic positioning
- Led buy-side target screening for a sponsor-backed MSP RMM/PSA provider seeking ~\$10M ARR ITOM/ITAM acquisitions with proprietary automation capabilities
 - Constructed global MSP software target list by mapping RMM, PSA, and remote-access features, integrations, and pricing models using vendor materials and product demos
 - Evaluated targets on ARR scale, growth, logo concentration, gross margin profile, and retention to prioritize outreach and frame potential cross-sell and efficiency synergies for customers

Wells Fargo

San Francisco, CA

Investment Banking Summer Analyst - Technology Group

June 2024 - August 2024

- Built ARR growth model given CAGR assumptions ranging from 30-50% for cybersecurity company and compared performance to 15 public comparables, showing client's accelerated revenue growth rate
- Analyzed CNAPP capabilities of 8 comparables in the cybersecurity sector across 5 metrics, including Cloud Security Posture Management, Cloud Workload Protection, and Cloud Infrastructure Entitlement Management

Scotiabank

New York, NY

Investment Banking & Capital Markets Summer Analyst

May 2023 - August 2023

- Contributed to comprehensive rotational internship across investment banking, FX options, and prime brokerage; supported research and analysis for internal pitches

Institut Européen d'Administration des Affaires (INSEAD)

Fontainebleau, France

World Research Assistantship Program (WRAP) Fellow

May 2022 - August 2022

- Funded to pursue research on defi adoption in emerging economies at INSEAD (1 of 4 WRAP Fellows)
- Published analysis on the socioeconomic effects of decentralized financial markets in El Salvador and the Central African Republic, using Python and NLP tools on Twitter corpora (published [here](#))

AWARDS

- The Sachs Program for Arts Innovation \$2,900 Grant Recipient (2025)
- SNF Paideia \$1,000 Small Grant Recipient (2025)
- Mack Institute for Innovation Management Y-Prize Startup Competition Finalist & \$1,500 Team Award (2023)
- NASA Gateways to Blue Skies Aeronautics Competition Finalist (2022)
- 1for2 Education Foundation \$80,000 Scholarship Recipient and Ambassador (2021)

LEADERSHIP & OTHER

- *Finance & Statistics Teaching Assistant*: Supported 800+ graduate and undergraduate students over 4 iterations of the Python for Data Science class and 200+ students in the Impact Investing course
- *Wharton Wellness Co-Chair*: Led 15-person board and 12+ initiatives impacting 1,200+ students annually
- *Wharton MBA Office Statistics Research Assistant*: Analyzed equity concerns across 2000+ data points from MBA Stakeholder Surveys using Python and JMP, and presented findings to the 7 Wharton Graduate Offices
- *Interests*: Scuba Diving [PADI Rescue Certified](#) (90+ dives) | Stand-Up Comedy (Performer)