

Octavio Mora-Perez

Los Angeles, CA | LinkedIn: www.linkedin.com/in/octavio-mora-perez | (805) 953-9232 | OctavioMpCareer@gmail.com

EDUCATION

Loyola Marymount University - Finance Major, Grad May 2025

Los Angeles, CA

PROFESSIONAL EXPERIENCE

AST Defeasance // Rate Cap Advisors - Real Estate Capital Markets (Sept 2025 - Present)

Financial Analyst at a Real Estate Capital Markets firm. Focused on processing transactions from start to finish such as Yield Maintenance transactions, CMBS Defeasance transactions, Collateral Swap transactions, and other debt restructuring processes. Responsibilities included debt portfolio modeling, cash flow modeling, collateral substitution modeling, and process documentation.

- Structured and analyzed transactions ranging from \$1M to \$100M, coordinating with loan servicers, borrowers, legal counsel, and institutional trading desks to ensure timing, collateral composition, and regulatory compliance.
- Processed and reviewed legal documents, CMBS reports, contracts, securities agreements, and securities portfolios to ensure precision in modeling and executing the transactions.

Ticketmaster - Financial Analyst Intern (Oct 2024 - Jun 2025)

Los Angeles, CA

Internship in the Financial Planning and Analysis (FP&A) department at Ticketmaster with exposure to both financial and accounting functions. Responsibilities included revenue tracking, analysis of sector financials, variance analysis, sales & operations forecasting, and preparation of quarterly performance presentations in compliance with company accounting policies.

- Creation of comprehensive reports detailing historical analysis and performance forecasts of entire business sectors (TicketWeb, a subsidiary of Ticketmaster), presented findings and 150+ data points to senior executives.
- Conducted weekly trend analysis and reconciliations on revenue streams across different sectors and made contributions to accrual-based reporting processes.

Sumitomo Mitsui Banking Corporation (SMBC) - Summer Intern (Jun 2024 - Aug 2024)

Los Angeles, CA

Internship in the bank's operations & compliance department. Responsibilities included the support of company compliance and regulatory/auditing processes, data validation, internal control documentation, Small Business (SBA) loan review, external and internal cross-team outreach, preparation of internal & reports, for federal regulators, and more.

- Creation of databases with over 100+ files required for regulatory review. Utilized Excel to create pivot tables, data visualizations, and automatically updating reports.
- Processed over 50 SBA compliant loans and donations in accordance with Federal & State CRA regulations.

ENTREPRENEURIAL EXPERIENCE

Z-Scope Marketing - Co-Founder (June 2022 - September 2023)

Los Angeles, CA

Event production & digital marketing company. Creating campaigns for companies in technology, entertainment, hospitality, and SaaS to promote brands via event production, social media campaigns, college ambassador programs, and more. Achievements include:

- Managed all company finances including revenue tracking, invoicing, expense reconciliation, and monthly profit analysis using excel.
- Created internal marketing analytics and forecasting reports for client meetings and performance evaluations.

Plots.App - Los Angeles Marketing Director (Oct 2021 - May 2022)

Los Angeles, CA

Oversaw regional marketing strategy and client acquisition for SaaS ticketing startup while supporting financial reporting, campaign budgeting, and marketing analytics processes. Responsibilities included:

- Led a marketing team and managed ad spend allocations, tracked customer acquisition costs, and ROI across different marketing campaigns.
- Analyzed performance data from multiple sources to identify profitable client segments and reduce churn.

VOLUNTEER EXPERIENCE

LMU Narcan Program - Founder (Jan 2022 - May 2025)

Los Angeles, CA

Founded on-campus initiative with the goal of preventing overdoses and distributing Narcan. Achievements include:

- Petitioned and successfully received over 2000 free doses of Narcan from California Dept. of Public Health.
- Successfully coordinated with LMU admin to receive, store, and distribute the free Narcan.

Westminster Free Clinic (Volunteer) - Medical Assistant & Translator (May 2018 - April 2021)

Thousand Oaks, CA

Three year-long volunteer program consisting of patient intake and training of other volunteers. Tasks included: providing medical care, community outreach, and translation work. Achievements include:

- Dealt with over 200 patients and gained over 400+ hours of volunteer work.
- Made presentations & speeches in both English & Spanish.

INTERESTS, SKILLS, AWARDS, & RECOGNITIONS

Skills: MS Excel, MS Ppt, Spanish (written & spoken), DCF Model, LBO Model, Multiple Valuation Model, Pro-Forma.

Interests: Combat Sports, Classical & Medieval History, Philosophy, Classic Films, & Biographies.