

# BENJAMIN SUTTER, CFA

## Data & Analytics Specialist

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## EXPERIENCE

### Data Scientist

#### Peloton Partners

Feb 2015 – Present

Remote

- Proven track record of high performance in fully remote roles for 10+ years.
- Analysed and Implemented Solutions for >200 firms in Australia / globally.
- Constructed internal automated reporting system using R / Python / SQL / ggplot / flextable to generate scalable high quality reports in minutes.
- Custom built AI Machine Learning / Optimization Algorithms to deliver niche solutions to clients.
- Designed, implemented, and maintained a comprehensive, vetted database of Australian financial advice firm data, including financials, client pricing, and staff information.

### Managing Director

#### Carson Equities

Apr 2013 – Jan 2015

Melbourne

- Financial Services consulting including Multifactor Equity Models & Research, Business Analysis, M&A Modelling, Pricing & Performance Analytics, Fund Administration

### Family Office Manager / Senior Analyst

#### Shadforth Financial Group

Nov 2011 – Apr 2013

Melbourne

- Managed Family Office team, co-ordinating delivery of high-net-worth client outcomes across many services areas.
- Served as Head Investment Strategist for HNW clients, introducing rigorous investment performance benchmarking and advanced portfolio modelling.
- Bloomberg Security Research and model development.
- Member of Shadforth Financial Group Investment Committee & Shadforth Financial Group Consulting Committee

### Financial Services Manager / Senior Analyst

#### Jeena Limited

Nov 2004 – Nov 2011

Melbourne

- Managed Financial Services team, co-ordinating delivery of high-net-worth client outcomes.
- Designed and implemented high-net-worth client service packages, including Capital Allocation Strategies, Investment Policy Statements, Estate Planning Waterfalls and Quarterly Dashboards.
- Chair of Investment Committee.

## OPERATING PHILOSOPHY

*“Deep thinking and methodical problem solving unlocks scalable commercial solutions that compound over time.”*

## MOST PROUD OF



### The Peloton Report Centre

High quality firmwide automated analytics & reporting



### Adviser Remuneration Benchmarking

AI driven Financial Adviser salary benchmarking



### Pricing Optimiser

Algorithmic engine that constructs optimal Pricing Frameworks for Financial Advice firms

## STRENGTHS

Strong Problem Solver

Methodical    Driven    Eye for Detail

Self-motivated    Independent

Multi-Disciplinary Intelligence

Communication Skills

Finance    Accounting & Business

Data Analysis    Data Visualisation

Machine Learning    Artificial Intelligence

Databasing    Mathematics

## LANGUAGES

R



Python



SQL



Power BI



Excel



## EDUCATION

CFA Charterholder

**CFA Institute**

⌚ 2008 - 2010

B.Com. (Distinction)

**Deakin University**

⌚ 2004 - 2006

Majors: Finance, Accounting

Award: Best Finance Graduate 2006

Award: Best Accounting Graduate 2006

B.A. (Hons.)

**Deakin University**

⌚ 1997 - 2000

Majors: Music, Mathematics

## REFEREES

**Paul Harper**

@ Strategic Opportunities Fund

Position: Director / RM at SOF

Previous: CEO of Jeena Ltd

**Elva Pica**

@ Peloton Partners

Position: Project Manager at Peloton Partners

Previous: Practice Manager at Shadforth Financial

**Eric Wong**

@ Lardner Partners

Position: Snr. Financial Adviser at Lardner Partners

Previous: Client Associate at Jeena Ltd

Contact details available on request.

## A DAY OF MY LIFE

