

Mason Otley

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Education

Lehigh University, Bethlehem, Pennsylvania

Expected Graduation: Spring 2023

BS in Business and Economics

Major: Finance - Minor: Sociology

GPA: 3.37 / 4

Relevant Coursework: Real Estate Finance, Securities Analysis & Portfolio Management, Corporate Financial Policy, Data Science for Finance, Consumer Insights Through Data Analysis, Microeconomics, Macroeconomics, Competitor and Market Analysis, Business Law

Work Experience

Rotational Internship

May 2022 – August 2022

Vermont Department of Financial Regulation (DFR), Montpelier, Vermont

- Conducted special projects for regulators in DFR's Insurance, Banking, Securities, Legal, and Captives Insurance Divisions.
- Attended the Vermont Captives Insurance Association (VCIA) annual conference, attending presentations and networking with industry professionals nationwide.
- Researched major financial legislation at both the state and federal levels.
- Polished skills in project management, communication among team members, and collaboration.

Investment Analyst Internship

June 2021 – August 2021

M. Kraus & Company, Shelburne, Vermont

- Gained valuable investment experience at a boutique investment management firm with roughly \$400m AUM.
- Contributed to the firm's quarterly newsletter which discussed The Federal Reserve's forecasting challenges and strategy involving the dual mandate.
- Observed strategy in portfolio management and assisted in the rebalancing of a newly transferred portfolio.
- Researched, compiled, and analyzed data using Excel.
- Utilized programs like Morningstar, Refinitiv Eikon, and Charles Schwab trading software.

Projects

Coca-Cola Valuation

November 2021

- Created a 10-year discounted cash flow (DCF) model in Excel with a team of classmates.
- Engaged in a valuation analysis of Coca-Cola common stock, ultimately coming to a buy/sell recommendation.

Diversity, Equity, and Inclusion (DEI) Presentation

July 2022

- Presented to a group of Vermont regulators about DEI issues in the financial industry, and the role that Vermont DFR could play in making progress.
- Proposed actions DFR could take to better address DEI issues for Vermont consumers.

Skills

Technical Skills: Microsoft Excel, Word, PowerPoint, Outlook, and Access; R programming language; Python (in progress); Project Management; Bloomberg Terminal

Soft Skills: Communication, Working in Teams, Organization, Leadership, Interpersonal Skills

Activities

Finance Club, Personal Investing, Fantasy Sports, Golf, Personal Fitness