

Matthew Newman

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Permanent Address:
12 Hilltop Rd
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WORK EXPERIENCE

Edge Wealth Management

New York, NY

Analyst

August 2018 - Present

- Assists Principals and Financial Advisors with portfolio management, client services, and capital market research
- Creates position holdings summaries, trade allocation files, and asset class weighting reports
- Updates DCF models, produces equity research, utilizes Bloomberg Terminal, reviews fixed income securities, and assists Chief Market Strategist in preparation for weekly strategy meeting
- Manages client service requests, CRM system, office operations, portfolio management software, marketing materials, company website, compliance procedures, payroll, and billing/invoicing processes

Aon

New York, NY

Risk Management Intern

June 2017 - August 2017

- Participated in Aon's Risk Management internship training program
- Worked within the Marine practice group assisting the Cargo, Logistics, and Haul + Liability teams
- Reviewed contracts, RFP's, quote summaries, policies, credit risk, and financial statements
- Attended meetings with Aon clients, insurance carriers, and company executives

Presidential Campaign

New York, NY

Research Analyst

May 2016 - August 2016

- Lead a team of interns who analyzed polling data, researched voter trends, and identified potential voters
- Mapped data from National Committee's collection database and identified areas for targeted campaigns
- Managed a volunteer call center conducting voter outreach in strategic states of interest
- Participated in building the campaign website, app, information reporting tools, and policy Q&A page

Presidential Campaign

New York, NY

Director of Voter Services

May 2015- August 2015

- First intern hired to work on the Exploratory Committee and acted as executive assistant to campaign manager
- Built campaign CRM system, automated mail response process, shipped all campaign merchandise, generated expense reports, drafted press releases, created daily news reports, and transcribed interviews
- Presented economic data to candidate and prepared graphic visuals illustrating relevant metrics and comparisons

Canoe Brook Country Club

Summit, NJ

Golf Caddie

May 2012 - May 2015

- Assisted golfers in club selection, course management, and maintained pace of play

EDUCATION

Tulane University, A.B. Freeman School of Business

New Orleans, LA

Bachelor of Science in Management

August 2014 - May 2018

Major: Finance, Minor: Political Science

GPA: 3.3

Relevant Courses: Venture Capital and Private Equity, Investments in Equities, Fixed Income Analysis, Financial Modeling, Advanced Financial Management, Intermediate Financial Accounting, Management Communication

Honors and Certificates: S.I.E. Exam, Dean's List 2016 and 2018, Top 99th Percentile ETS Score

Columbia University

New York, NY

Columbia Engineering Fintech Bootcamp

March 2020 - September 2020

Skills: Advanced Microsoft Excel, financial modeling, financial analysis, Python, SQL, Matplotlib, Amazon Web Services, algorithmic trading, forecasting, machine learning applications, blockchain and cryptocurrencies

VOLUNTEER AND ACTIVITIES

Volunteer Work: Habitat for Humanity, The Green Project, New Orleans Boys and Girls Club of America, New Orleans Pelican's Game Day Staff, The Freret Street Neighborhood Center, Wounded Warriors Foundation

Activities: Kappa Sigma Fraternity, Investment Club, Political Science Club, Golf, Skiing, Running, Basketball