Matthew Ohman

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EDUCATION

University of Oklahoma (OU), Price College of Business   **Anticipated Graduation: May 2022**
B.B.A. in Finance and *Management Information Systems (MIS)*
Cumulative GPA: 3.96 / 4.00
- <u>Relevant Coursework</u>**:** Financial Modeling, Public Speaking, MIS Field Project, Business Programming, Investments, Databases Derivative Securities, Fixed Income Securities, Student Investment Fund, Advanced Corporate Finance, Intermediate II Accounting

HONORS and RECOGNITION

- **Eagle Scout:** Since 1911, 4% of Boy Scouts have earned the rank of Eagle
- **Phillips 66 SHIELD Scholar:** Awarded to high-performing students in fields of study pertinent to the recruiting needs of Phillips 66

WORK EXPERIENCE

Goldman Sachs (GS), *Global Markets Summer Analyst - Management & Strategy Team*   **June 2021 – August 2021**
- Leveraged Alteryx to reduce 99% of human error and 97% of time spent developing quarterly report for Interest Rates Products team
- Developed product knowledge in treasury products, equities, derivatives, interest rate swaps, and prime lending
- Collaborated with fellow interns to develop a Blockchain integration project. Worked with Digital Assets group to conduct research
- Analyzed GS and competitor quarterly earnings to project the regulatory environment and plan tier-1 capital allocation
- Built QlikView dashboard to guide Engineering management to effectively allocate headcount to client-oriented projects

The Oklahoma Group (TOG), *Consultant*   **August 2020 – December 2020**
- Provided strategic advisory on donor stewardship to a non-profit client in Oklahoma City, OK with a team of fellow students
- Developed 22-page research report on legacy giving, targeted donor marketing, and a tiered donation benefit system
- Compiled interviews with estate planning and nonprofit experts and benchmarked key statistics to comparable nonprofits

First United Bank (FUB), *Financial Data Analyst*   **June 2020 – August 2020**
- Built Alteryx program that segmented 5K PPP loan customers and 100K+ checking customers into marketing archetype segments
- Presented Tableau report to bank executives about the project predicting attrition, measuring sales impact, and assisting other projects
- Gained experience in Microsoft Power BI building data models and visualizing YTD performance for checking account sales

LEADERSHIP and INVOLVEMENT

Investment Club at The University of Oklahoma, *President and Founder*   **April 2021 – Present**
The club educates students of all experiences to develop confidence in their ability to invest through interactive discussions and curriculum
- Grow club membership and involvement. Reached 173 registered members within first month of club's debut
- Strategize programs, develop education curriculum, guide weekly discussions, and foster relationships with professional speakers.
- Lead team of 6 officers. Assign responsibilities, plan meetings, and develop officer leadership abilities.

JCPenney Leadership Program (JCPLP), *Associate / Event Moderator*   **September 2020 – Present**
- Guide discussions with guest speakers and panels through event moderator position
- Serve community with fellow student leaders through philanthropy and involvement opportunities with nonprofits and local government

Norman Regional Health System *Board Fellow / Consultant*   **January 2021 – Present**
- Serve the Board of Directors by organizing service opportunities and analyzing report from monthly board meeting
- Built Simul8 model to help leaders organize outpatient therapy clinics and vaccine clinics (semester long project)

OU Dance Marathon: Children's Miracle Network Hospitals, *Business Development Executive*   **September 2018 – May 2020**
OU's largest philanthropy that donates proceeds to the OU Children's Hospital. OUDM raised $1MM for the 2019/2020 campaign
- Compiled Tableau report highlighting the social and financial impact of involving underrepresented groups

PROJECTS and DISTINGUISHED COURSEWORK EXPERIENCE

OU Student Investment Fund, *Analyst – Industrials Sector*   **January 2021 – Present**
- Value current and potential portfolio holdings by creating pro-forma valuation models and collecting firm-specific research
- Deliver buy/sell/hold recommendations to the fund's board of directors based on conducted valuation

SKILLS and INTERESTS

Software: Alteryx (Core Certified), Tableau, Excel, SQL Studio, Visual Studio, Bloomberg Terminal (Learning), Simul8 (Learning)
Coding: SQL, C#, HTML & CSS, basic Python
Interests: Backpacking, philosophy, completed a marathon, college football and NFL, pickup basketball, cooking cajun food, collecting records