# Resume

MARCUS PETERSON

Denver, Colorado | 352-584-0573 | marcuslukepeterson@gmail.com | linkedin.com/in/mpeterson27/

## EDUCATION

• Relevant Coursework: Global Investment Principles, Global Financial Markets, Financial Modeling, Financial Data Analysis with Python, Portfolio Management, Advanced Corporate Finance, Machine Learning for Finance

FORDHAM UNIVERSITY, GABELLI SCHOOL OF BUSINESS – New York, NY  
MS, Global Finance, GPA 3.9 2021-2021

• Relevant Coursework: Principles of Financial Accounting, Financial Statement Analysis, Debt and Equity Markets, Advanced Topics in Financial Management

UNIVERSITY OF CENTRAL FLORIDA – Orlando, FL  
BSBA, Finance 2015-2018

## PROFESSIONAL EXPERIENCE

CBIZ MHM, LLC – Denver, CO  
Manager Data Analytics Center of Excellence - Business Analyst

• Conduct research for special projects involving business clients in unique situations  
• Developed processes and procedures for CARES Act related tax incentives  
• Automated tax incentive client data intake, calculations, and work paper use  
• Conducted interviews and trained employees to grow the CARES Act consulting team

CBIZ MHM, LLC – Denver, CO  
Associate, Financial Services Consultant 2021-2022

• Managed a book of more than 400 clients and $30m in assets  
• Exceed requirements for monthly productivity including new money and product origination  
• Tailor solutions for client's specific financial needs using investment, lending and business banking products  
• Abide by regulatory procedures and complete monthly education courses on compliance

JP MORGAN CHASE – New York, NY  
Relationship Banker, Consumer and Commercial Banking 2019-2021

## PROJECTS

• Led team during a semester long project to conduct a SWOT analysis for Office Depot  
• Devised a solution, analyzed impact and presented project to corporate leaders of Office Depot  
• Created a long term financial analysis plan including costs and future cash flows  
• Team won class wide competition and placed 4th in school wide competition

STRATEGIC MANAGEMENT COMPETITION – Summer 2018  
• School wide competition to implement real world management solutions to improve business activities for select business

## TECHNICAL SKILLS

• Computer: Python, LLM/NLPs, Machine Learning, Advanced proficiency in Excel/Microsoft Word/PowerPoint, Power BI, React.js, SQL

• Azure: AI-900, Computer Vision in Azure, Azure Machine Learning, NLP in Azure

• Alteryx: Core Certified, Advanced Certified, Server Administration Certified, Machine Learning Certified, Fundamentals Micro-credential, Intelligence Suite proficiencies

• Licenses (Previously): FINRA Series 6, 63, NY State Life Insurance for Fixed and Variable Annuities, Securities Industry Essentials Exam

• Project Management: Professional SCRUM Master I

## ADDITIONAL EXPERIENCE

• Helped create and manage the Data Analytics Center of Excellence for Financial Services  
• Developed solutions for internal teams and clients to automate tasks  
• Worked closely with IT for seamless roll-out and oversight of analytic tools

• Aided in the roll-out of Alteryx for data analytics and automation nationally  
• Created policies and governance for data analytics and automation efforts  
• Managed servers and data warehouses for data analytic platforms  
• Created and ran help desks related to analytics platforms

• Managed solution development teams to create analytic products for internal and external use, including the implementation and oversight of our Jira environment