

Nicholas P. Matzelle

| (516) 280-0802 | npm3@geneseo.edu | [LinkedIn Profile](#) |

EDUCATION

State University of New York College at Geneseo

School of Business

Bachelor of Science in Accounting with Finance and Data Analytics minors

Expected Graduation May 2022

Bloomberg Market Essentials Certification

GPA: 3.69

EXPERIENCE

Geneseo Student Managed Investment Fund (SMIF)

SUNY Geneseo

Senior Analyst – Equity Research and Portfolio Management

September 2018 to Present

- Design and execute portfolio strategy and positions as a member of the Investment Committee for the \$400,000 student led equity fund.
- Interpret, develop, and present visualizations of comprehensive financial charts of company 10k data for fundamental analysis utilizing Excel, Python, Bloomberg, and Morningstar.
- Led a team of 7 junior analysts in research on SMIF's position in Constellation Brands (STZ), which was used as foundation for interviewing Constellation Brands Investor Relations team in a club meeting.
- Successfully presented buy positions on OLLI, AMD, and NOW which saw 6%, 92%, and 54% unrealized gains, respectively.
- Monitored portfolio risk throughout COVID-19 in a series of stress tests, incrementally reducing the values of a company's balance sheet, while forecasting different debt scenarios.

CFA Research Challenge (CFARC)

SUNY Geneseo

Team Captain

May 2021 – February 2022

- Represented SUNY Geneseo across NYS while leading a team of three analysts to create a well-ground financial analysis and investment decision on the assigned company.
- Worked under the advisement of an Equity Research Analyst from Manning & Napier.
- Presented our research to multiple executives and CFARC judges, earning 2nd place.

Constellation Brands (CBI)

Victor, NY

Internal Audit Advisory Services (IAAS)

May 2021 – September 2021

- Monitored the efficiency of Constellation Brand's due diligence process learning about the responsibilities of CBI departments throughout previous acquisitions.
- Conducted a series of interviews with Corporate Development, TAaC, Treasury, Global Accounting, Legal, Sales & Marketing, IT, Compliance, Payroll, and other key CBI functions to validate their processes and procedures.
- Collaborated with 4 interns in an Action Learning Project pitch, recommending a \$10,000,000 reinvestment in CBI Product and presented to a group of 70 interns and multiple executives.
- Used CBI valuation tools to create a DCF of Press Seltzer, and calculated IRR for different scenarios testing the success of the reinvestment.
- Collaborated with managers of IAAS department to conduct fraud analysis, and presentations.

Raymond James Financial Services (RJFS)

Garden City, NY

Finance Intern

May 2020 – September 2020

- Utilized data from RJFS software to monitor the performance of over 400 client accounts.
- Attended client meetings with financial advisors, discussing topics of wealth management.

COLLEGE EXTRACURRICULARS AND ACTIVITIES

- Student Peer Advisor for incoming and current students of SUNY Geneseo.
- Member of Marketing Club, Finance Club, Philosophy Club, & Kappa Sigma Fraternity.