

Niko A. Orecchio

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EDUCATION

Lafayette College

Bachelor of Arts, Economics

Easton, PA

August 2020 – May 2024

- GPA: 3.45 ACT: 35/36
- Relevant Coursework: Corporate Finance, Accounting, Financial Theory and Econometrics
- Activities & Awards: Investment Club, Dean's List (5x Honoree), Hellenic Society (Co-Founder)

PROFESSIONAL EXPERIENCE

Kitces.com

Research & Data Analysis Intern

Remote

Spring 2024 – Present

- Contributing 20 hours a week to leading financial advisory authority during my final semester of college and continuing through Summer 2024
- Conducted industry research and analyzed customer data to provide analysis of their product offerings

Culper Capital Partners

PE Summer Analyst

Closter, NJ

May 2023 – August 2023

- Summer analyst at family office focused on medical device and aerospace & defense sectors, with investments in businesses typically ranging between \$5 and \$20 million of EBITDA
- Aided in the analysis and modeling of CIMs, gaining in-depth exposure and practice analyzing complex investment opportunities
- Worked closely with platform company's CEO, spearheading an exploratory project on the implementation of AI into their manufacturing processes

Modera Wealth Management LLC

Financial Analyst Intern

Westwood, NJ

May 2022 – January 2023

- Worked closely with advisors and CSAs, assisting with data management and analysis
- Co-developed "Financial Planning Assumptions" report which integrated various economic and demographic factors to help advisors create more accurate and personalized client plans

Kirby Recreation Center

Associate Fitness Supervisor

Easton, PA

September 2021 – May 2024

- Worked in a supervising role similar to what a graduate student might expect at a larger college
- Train and oversee 50+ entry level employees in various departments of the recreation center. Trained employees in CPR and First Aid as well as handle payroll, scheduling, and employee recruitment

JerseyGems Trading Cards

Founder

Old Tappan, NJ

September 2022 – Present

- Founded and currently operate a trading card and collectible reselling business, channeling sales primarily through eBay and Instagram (@jerseygemstradingcards)
- Generated over \$10,000 in revenue in first six months in business while maintaining 100% positive feedback, earning eBay's "Top Rated Seller" status

INTERESTS AND ADDITIONAL INFORMATION

- CFA Designation: Level 1 Candidate (Pending October Result)
- Wall Street Oasis LBO Boot Camp Participant
- Bloomberg Market Concepts
- **Interests:** Fitness & Running, Java Coding, Skiing, Trading Cards, Golf

Contacts: Kitces.com (michael@kitces.com), Culper Capital (acook@culpercapital.com), Modera Wealth Management (kellyh@moderawealth.com) Lafayette College (freyj@lafayette.edu)