

# Matthew Stuart

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## OBJECTIVE

Financial Analyst position with Apple, Inc.

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## EDUCATION

California Polytechnic State University, San Luis Obispo  
Bachelor of Science Degree: Business Administration- June 2011  
Concentration: Finance Minor: Psychology  
GPA: 3.64 Major GPA: 3.44

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## COURSEWORK

- Fundamentals of Corporate Finance
  - International Finance
  - Securities Analysis
  - Entrepreneurial Finance
  - Intermediate Accounting I and II
  - Accounting Process Analysis
  - Case Studies in Finance
  - Student Managed Portfolio Project (January 2011)
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## FINANCE EXPERIENCE

*Financial Planner Intern*

William Henry Crew, III Wealth Management Group, Inc. May 2010 to Present

- Developed financial plans for 10 clients based on their specific needs and situations.
  - Performed daily stock/mutual funds transactions as well as assisted clients in updating their accounts.
  - Responsible for planning and organizing an estate planning workshop for a group of 20 clients.
  - Enhanced my phone etiquette and office administration skills while dealing with clients and mutual fund companies.
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## RELATED EXPERIENCE

*Peer Advisor*

Orfalea College of Business September 2009 to August 2010

- Assisted business students by helping plan their upcoming schedules to insure they are on track for graduation.
- Initiated, lead, and completed various internal projects for the Orfalea College of Business.
- Created and delivered presentations to incoming students about Cal Poly's registration system and university policies.

*Construction Assistant*

Landscape Pros June 2009 to August 2009

- Accountable for finishing numerous tasks according to timelines and contractual specifications.
  - In charge of preparing the job site which entailed digging, framing, and demolition.
  - Completed weekly client follow up maintenance for completed projects.
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## LEADERSHIP & HONORS

Vice President , Financial Management Association (FMA)  
Beta Gamma Sigma National Honor Society  
President's List- Cal Poly San Luis Obispo- 2009 to present  
Dean's List- Cal Poly San Luis Obispo- 2008 to present

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## COMPUTER SKILLS

Excel, Outlook, Access, Word, PowerPoint, FrontPage, Publisher, Morningstar, Brio Query, Lumen Systems