

ORANGE VALUE FUND
Class of 2017 Analysts

Gary Graves

Jason Handler

Ahmad Hasan

Angus Heaton

Anisa Khalouf

Jonathan Peatfield

Daniel Piccininni

James Ransom

Brittany Rich

Brendon Rossmeisl

Matthew Switzer

Gary Graves

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EDUCATION

Syracuse University, Martin J. Whitman School of Management

Syracuse, NY

Bachelor of Science in Finance

Expected December 2017

- **GPA:** 3.38/4.00
- **Honors:** Dean's Scholarship – All Semesters

WORK & LEADERSHIP EXPERIENCE

The Orange Value Fund, LLC

Syracuse, NY

Junior Analyst

August 2015–Present

The Orange Value fund is an elite two-year money management and investment banking program, where students are trained to become both investment analysts and money managers while managing a \$4.0M portfolio using a deep value investing methodology similar in nature to Martin J. Whitman's "safe and cheap" approach (a weekly commitment of 10-50 hours)

- Develop and recommend investment ideas using comparable companies, multiple analysis, and also an assessment of capital resources and stakeholders
- Construct research and assist senior analysts in periodically tracking holdings by reading updated annual reports, conference calls, and SEC filings
- Completing courses in Value Investing, Financial Modeling for Investment Banking, Control Investing, Distress Investing and Intro to Derivatives

BBVA

New York, NY

Summer Analyst, Emerging Markets Sales

July 2015 – August 2015

- Conducted research on Emerging Markets FX and credit using Bloomberg and BBVA Global Markets Research to assist sales force in pitching products to clients
- Generated daily and weekly market commentary, including bond flows, technical trends and important economic data to be sent to sales team
- Assisted senior traders/sales with tracking g-spread, correlations, and price fluctuations of over 30 issuers to provide context on the market
- Pitched trade ideas and market overview of local current Mexican debt (MBONO's) to sales force, traders and strategists

Syracuse University Investment Club

Syracuse, NY

Chief Research Officer

September 2014–Present

- Conduct research using press releases and fundamental analysis (10-K's and annual reports) to evaluate potential equities and apply to portfolio thesis
- Delivered successful investment theses on the common stock of Stryker (SYK) for consideration of full position (\$10,000) in the \$160,000+ portfolio
- Initiated strategy for analyst to present weekly thesis of assigned sectors by researching market news and data and providing a recommendation on individual securities

SKILLS, ACTIVITIES & INTERESTS

Skills: Bloomberg Core Essentials Certified, Microsoft Office (Word, PowerPoint, Excel)

Activities: Financial Management Association, Whitman on Wall Street, Revlon Run/Walk for Women

Interests: Tennis, Pick-up Basketball, Football, Delta Sigma Pi Professional Fraternity

Gary Graves

Gary hails from Los Angeles, CA. In high school, Gary became exposed to the financial industry through a family friend who served as a pivotal mentor leading Gary to start an investment club. The investment club brought likeminded individuals who shared an interest in investing and a desire to learn the basics of trading together, the members used the MarketWatch Virtual Stock Portfolio platform to further their financial literacy. Gary continued to exemplify his leadership and team player attributes being the captain and quarterback of the high school's football team.

Now Gary is a Finance major at Syracuse University and continues to expand his knowledge and passion. Since enrollment at Syracuse University he has become an active member of one of the largest co-ed professional business fraternities, Delta Sigma Pi and Financial Management Association while holding a leadership position in the Investment Club. As an analyst in the Investment Club he conducted research to develop a thesis for the portfolio; beginning by reading financial news sources such as Wall Street Journal, Bloomberg, and PricewaterhouseCoopers (PWC) to gain information on the sector along with analyzing 10-K's and annual reports of BioPharma securities held in the portfolio. Afterwards Gary became the Chief Research Officer of the Investment Club managing a team of research analysts that conduct fundamental analysis on assigned securities and providing an opinion based on market research. The research and analysis skills acquired being involved in the Investment Club has allowed him to become a valuable member of the Orange Value Fund. Gary remains confident and passionate for the financial services industry and looks forward to further develop his skills.

Current Address:

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Syracuse, NY 13210

Jason Handler

jason.handler@orangevaluefund.com

847-826-5454

Permanent Address:

117 Pembroke Cir.
Lake Bluff, IL 60044

EDUCATION

Syracuse University

Martin J. Whitman School of Management

Major: Finance (B.S.)

Minor: Economics (B.A.)

Honors: Renée Crown University Honors Program | National Society of Collegiate Scholars | Deans List: All Semesters

GPA: 3.758/4.00

Syracuse, NY

May 2017

EXPERIENCE

The Orange Value Fund LLC

Syracuse, NY

Junior Analyst

August 2015- Present

The Orange Value Fund is an elite two-year money management and investment banking program, where select students are chosen and trained to become both investment analysts and money managers while managing a \$4.0M portfolio using a deep value investment methodology similar in nature to Martin J. Whitman's "safe and cheap" approach (a weekly commitment of 10-50 hours).

- Propose, develop, and defend investment ideas for the Fund using NAV, comparable companies, precedent transactions, and multiples analysis, as well as assessment of liquidity, capital resources, management, and debt and equity holders
- Assist senior Orange Value Fund analysts in tracking periodic developments of current portfolio headings by reading press releases, SEC filings, monitoring quarterly conference calls, media reports, and updating research reports accordingly
- Complete required courses including Value Investing, Control Investing, Distressed Investing, and Financial Modeling

Mesirow Financial

Chicago, IL

Wealth Advisory Summer Intern

June 2015- August 2015

- Performed due diligence on over 30 equity securities actively held by clients using independent investment research to report and summarize quarterly statements
- Participated in meetings between wealth advisors and mutual fund portfolio managers from First Eagle Funds and First Pacific Advisors LLC about both short and long-term prospects for their funds
- Completed a comprehensive case study, using a holistic approach, to create a college, retirement, and estate plan through a personalized investment strategy to realize returns while mitigating risk and limiting exposure to taxes

LEADERSHIP

Sigma Alpha Epsilon Fraternity

Syracuse, NY

Eminent Deputy Archon

May 2015- Present

- Assist the Eminent Archon with day-to-day chapter operations
- Responsible for Standards and Judicial Affairs within the chapter; maintaining Sigma Alpha Epsilon's True Gentleman Experience
- Relay chapter information to the Chapter Adviser, Nationals, as well as Syracuse University's Office of Fraternity and Sorority Affairs

Investment Club

Syracuse, NY

Research Analyst

Fall 2014- Present

- Research potential investment opportunities to pitch to the executive board and other analysts
- Evaluate and vote with other analysts on the future holdings of our \$150,000 portfolio
- Attend and listen to lectures from industry leaders on investment techniques and strategies

ACTIVITIES AND SKILLS

- Syracuse Orange Men's Club Lacrosse
- Whitman on Wall Street- 3-day trip to New York City to visit large financial institutions to learn about potential careers
- Bloomberg terminal certified (Equity, Fixed Income, FX, and Commodities)
- Proficient in Microsoft Excel, Outlook, PowerPoint, Word
- In the process of achieving certification as a Microsoft Office Specialist Excel 2013

Jason Handler

Jason was drawn to the world of finance after taking a field trip to the Chicago Board of Trade as a sophomore in high school. He was fascinated by the energy and quick pace at which the people around him were moving. That initial interest grew into a career path when Jason realized the magnitude of opportunities -and risk- that came as a result of investment decisions. His passion for the world of investing led him to Syracuse University to pursue a degree in finance from the Martin J. Whitman School of Management.

From the moment Jason first stepped onto campus as a freshman, he was eager to expand his knowledge of finance. He immediately took advantage of the resources provided by the university and became Bloomberg terminal certified allowing him to gain a more in-depth understanding of publicly traded companies. Jason has continually excelled in the classroom as demonstrated by his acceptance into the Renée Crown University Honors Program and consistent recognition on the Dean's list. He joined the Syracuse University Investment Club to get the hands-on experience that comes with managing the Fund's \$150,000 portfolio. In addition to his academic and professional interests, Jason is very involved in his social fraternity, Sigma Alpha Epsilon, where he has taken a leadership role, serving as the chapter's Vice President. In this role, he is second in command, assisting in all functions of the chapter. Jason is also a member of the Syracuse University Men's Club Lacrosse team, allowing him to stay active and keep his competitive spirit alive.

This past summer, Jason worked for Mesirow Financial as a Wealth Advisory Intern. In this position he was responsible for performing due diligence on equity securities actively held by clients. The internship culminated with a case study to create a personalized investment strategy for a client.

Jason is excited to begin his work as a junior analyst for the Orange Value Fund, LLC. He believes that this is a great opportunity to get an unmatched financial education while simultaneously realizing real gains in the value of the fund. Upon graduation, Jason hopes to use his competitive drive, ability to multitask, and analytical skills to pursue a career in the financial services industry.

Ahmad Hasan

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Middletown, NY 10940

Phone: (845) 321-0918
Email: ahmad.hasan@orangevaluefund.com

Education

Syracuse University, Martin J. Whitman School of Management (Syracuse, NY)

May 2017

B.S in Finance and Accounting

Overall GPA: 3.65/4.0

Dean's List

Work Experience

The Orange Value Fund, LLC

Analyst

August 2015- Present

The Orange Value Fund is a two-year money management and investment banking program, where students are trained to become both investment analysts and money managers while managing a \$4.0 M portfolio using a deep value investment methodology similar in nature to Martin J. Whitman's "safe and cheap" approach.

- Achieving Bloomberg certification in equity, fixed income, commodities, and FX
- Completing the following course modules: *Value Investing, Introduction to Financial Modeling for Investment Banking, Control Investing, Distress Investing.*
- Researching and writing a report on a portfolio company under the supervision of a Senior Orange Value Fund Analyst.
- Assisting Senior Orange Value Fund Analysts in their work.

JP Morgan Chase & Co.

Accounting Analyst Intern

June 2015- August 2015

- Conducted testing on internal controls in compliance with the Sarbanes-Oxley (SOX) Act of 2002 in order to determine if the controls were designed and operating effectively by quarter-end.
- Collaborated with other departments within the Consumer and Community Banking line of business, such as Finance, Operations, and Marketing to test internal controls and to gain a broader understanding of the firm.
- Worked with manager to create dashboard to facilitate the review of control issues by all those responsible within the CCB SOX Program.

Law Office of Alex Smith, Esq./ Middletown City Hall

Intern

Summers 2012 & 2014

- Conducted legal research using *Westlaw* for all cases pertaining to the City of Middletown and presented research to City Attorney to use in legal briefs, appellate briefs, and memorandums.
- Shepherdized legal documents by searching old case law and updating all outdated cases for the City Attorney to use in legal documents.
- Adjusted Code for the City of Middletown to remove outdated ordinances and added new city ordinances.

Community Service

Pakistani-American Cultural Society of Orange County (PCSOC)- Youth Leader (2007- 2013)

Middletown Islamic Center

Youth Leader

Summer 2012- Present

- Actively coordinated, planned, and prepared all community events during Islamic holidays, such as Ramadan and Eid-ul-Adha.
- Constructed financial statements for the non-profit organization to improve bookkeeping of assets, cash flows, and revenues

Leadership & Extracurricular Activities

Investment Club: Member (Fall 2013-present)

Muslim Student Association: Member (Fall 2013-present)

GoldenKey National Honor Society: Member (Fall 2013-present)

Family Business Club: Member (Fall 2013-present)

Technical Skills

Programs: Microsoft Excel (certified), PowerPoint, and Word

Languages: Fluent in English and Urdu. Proficient in Arabic, Hindi, and Spanish.

Miscellaneous: Fast Computational Skills

Relevant Coursework: Financial Management, Derivatives, Corporation Finance, Principles of Marketing, Supply Chain Management, Management in a Global Setting, Intermediate Financial Accounting, Managerial Accounting, Microeconomics, Macroeconomics, Strategic Management, Business Law, Principles of Management, Psychology.

Ahmad Hasan

Ahmad was first introduced into the world of finance from his middle school history teacher, Mr. Brown, who gave him a very basic introduction to the functions of the stock market and the overall economy. Once that seed of interest was planted, it never stopped growing. He was constantly yearning for more knowledge about the mechanisms of the financial world and the impact it had on the economy.

Ahmad hails from Middletown, NY, which is a small town that is located in the suburbs of upstate New York. He attended Middletown High School where he graduated valedictorian of his class, played singles on the Boys' Varsity Tennis team, and was involved in many clubs, such as Scholastic Bowl, Math Team, and Mock Trial. In addition, he was involved in a great amount of community service where he volunteered in organizing events for the Pakistani and Muslim community. This experience taught Ahmad not only to work for one's own success, but for the success of the community as a whole.

Ahmad has a double major in finance and accounting. He believes that the two majors complement each other very well, and that an extra insight on accounting is essential to better understand finance. While his main focus is on finance, Ahmad sees accounting as a way to improve his understanding of finance and a means to gain a more in depth understanding of business as a whole.

Throughout his career at Syracuse University, Ahmad has taken advantage of every opportunity that was open to him. He came to Syracuse University with nearly 50 credits on hand as a freshman, due to the vast number of college courses he took in high school. This enabled him to focus straight on business and finance as soon as he entered college, which helped him gain a head start.

Additionally, he is interning for JP Morgan Chase & Co. this summer as a summer analyst in New York City. This internship, along with the working environment that is in the City will better prepare him for the future in banking, where Ahmad would like to focus his career in. This internship is focused on accounting, as opposed to finance, is due to the fact that it will help him gain a better understanding of finance through accounting in a professional environment. He believes that these experiences, as well as his background will be a very useful asset to the Orange Value Fund and will help to continue to succeed on newer levels.

Angus Heaton

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EDUCATION

Syracuse University

Martin J. Whitman School of Management, BSc. Finance and Real Estate. Cumulative / Major GPA: 3.187/4.00.

Syracuse, New York, USA

Expected May 2017

EXPERIENCE

Orange Value Fund, LLC

Junior Analyst

The Orange Value Fund is a two-year money management and investment banking program, where a select number of Finance students per year are trained to become both investment analysts and money managers while managing a \$4M portfolio using a deep value investment methodology similar in nature to Martin J. Whitman's "safe and cheap" approach.

- Research and write a report on a portfolio company under the supervision of a Senior Orange Value Fund Analyst.
- Assist Senior Orange Value Fund Analysts in their development of investment ideas for the fund.
- Complete additional Finance course modules for the program such as Value Investing, Introduction to Financial Modeling for Investment Banking, Control Investing and Distress Investing.

Syracuse, New York, USA

August 2015 – Present

BD Securities, JSC

Intern, Mongolian Equities Research

- Assisted in writing of research report on the performance of Mongolian Stock Exchange Top 20 Index over the past year. Extensively used Excel and Adobe InDesign to create annotated charts and to put together the research report itself.
- Wrote research on the possibilities for appeal on international arbitration cases and the process of seizure of assets in relation to awards of US\$104 million in a controversial case between Khan Resources and the Government of Mongolia.

Ulaanbataar, Mongolia

Summer of 2015

Deutsche Bank

Intern, Japanese Equities Sales and Trading

- Researched and pitched short term sell position for Panasonic. Also pitched opinions on Japanese gaming industry and Samsung as a rival to Panasonic.
- Shadowed salesperson in client meetings and created transcripts of questions and answers for salesperson to use in follow up messages to clients. Acquired an in-depth understanding of the front office departments within an investment bank.

London, UK

Summer of 2012

Deutsche Bank

Intern, Japanese Equities Sales and Trading

- Analyzed financial metrics from annual reports to advise on future performance of equities.
- Shadowed managing director in client meetings and created transcripts of questions and answers.

London, UK

Summer of 2011

RBS Group

Intern, Asian Equities Sales and Trading

- Researched and pitched buy/sell/hold position for a number of Chinese steel companies to Managing Director.
- Shadowed salesperson in client meetings providing transcripts of meetings and acquired knowledge on basics of the investment banking structure.

London, UK

Summer of 2011

The Idea Lab

Intern, Advertising

- Worked alongside account managers on Burger King advertising campaign carried out through mediums of TV, public transport and social media.
- Advised on design for advertisement and billboards to be used for nationwide campaign.

Singapore, Singapore

Summer of 2013

EXTRA CURRICULAR

Syracuse University Investment Club Oil & Gas Exploration Sector Analyst

- Use annual 10-Ks, quarterly conference calls and news updates to pitch buy/sell/hold positions on companies to help manage our total \$150,000 portfolio in the club.
- Responsible for regularly updating members of investment club on the performance of our holdings in the oil and gas exploration sector.

January 2015 – Present

CFD Index & Foreign Exchange Trader

- Managed highly leveraged portfolio over 2 month period whilst managing risk through uncompromisingly applied risk management strategy consisting of trading no more than 3% of portfolio at any one time in any asset and trading only in a ratio of expected gain to potential loss of 3:1.

September-November 2012

SPGT Charity Committee 2012 & 2013

- Raised £3500 in 2012 and £3000 in 2013 for charity with a committee of 16 members.
- As head of ticket sales in 2013, I learnt to co-ordinate responsibilities to subordinates and to inspire them to be effective salesmen. As a junior committee member in 2012, I was heavily involved in front-line sales and execution of tasks such as purchasing of certain goods required for the event.

September-January 2012 & 2013

Carrier Dome Changeover Crew

- Overnight construction and break down of flooring, staging and seating set ups in preparation for the different events at the Carrier Dome such as NCAA Basketball, Lacrosse and Football as well as non-sporting events that included concerts and motorsport events.

March 2015 – Present

Certifications & Training: Microsoft Excel Certified and Bloomberg Certified (Equity and Fixed Income).

Activities and Interests: Syracuse University Ski Race Team Member, squash, mountain biking, golf.

Angus Heaton

Having grown up in two major cities, London and Tokyo, Angus has always felt at home in energetic and fast paced environments which partly explains his attraction to financial markets. His first experiences in finance came from watching market updates on TV in the morning with his father before he went to work. What started with a casual morning activity snowballed over the years into a deep passion he now holds for the financial industry as a whole.

Whilst in London, he had two internships at the end of his sophomore year in high school in sales and trading at Deutsche Bank and RBS and a third internship at the end of his junior year, again, at Deutsche Bank, all three of which helped grow his interest in financial markets further. His insatiable appetite for the financial markets after completing these internships drove him to learn about and exercise technical analysis in trading during his lunch breaks in high school, an activity he still looks back on fondly.

In his pursuit to gain a more global mindset, Angus secured an internship in Singapore in advertising at the end of his senior year in high school where he had the opportunity to gain exposure to the work environment in Asia, a continent where he hopes to one day work again in, but this time, in Finance. In pursuing his goal to gain further international experiences, Angus chose to study in the US instead of staying in the UK, where the large majority of his high school peers chose to stay.

At Syracuse, Angus involves himself in the Syracuse University Investment Club where he is the oil and gas exploration sector analyst. His role as an analyst is one that he sees as more than just the responsibility of keeping the club updated on the performance of the club's holdings in the sector, but also a deeply interesting extra curricular activity. Angus is also a highly active member of the Syracuse University Ski Team where he enjoys the rewarding nature of the competition between himself and other racers.

In the summer of his sophomore year at Syracuse University, Angus worked at BDSec JSC, the largest stock brokerage and investment bank in Mongolia where he helped write and put together research on the past year's performance of the MSE Top 20 Index. He also learnt about international law whilst writing research for BDSec JSC on international arbitration cases. Angus hopes to be a strong asset to the Orange Value Fund program by bringing with him fresh and original investment ideas and perspectives. After graduating, Angus hopes to follow a career in equity research or sales and trading.

Anisa Marie Khalouf

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126 Conover Road
Pittsburgh, PA 15208

743 Comstock Avenue
Syracuse, NY 13210

EDUCATION

Syracuse University, Martin J. Whitman School of Management

Bachelor of Science, expected May 2017

Major: Finance and Accounting

- National Society of Collegiate Scholars, Deans List

Syracuse University Madrid

Summer Session Student

Syracuse, NY

GPA: 3.363/4.0

Madrid, Spain

May 2015- July 2015

WORK EXPERIENCE

Orange Value Fund, LLC

Junior Analyst

Syracuse, NY

April 2015-Present

The Orange Value Fund is a two-year money management and investment banking program, where students are trained to become investment analysts and money managers

- Manage a \$4M portfolio using the philosophy and values exposed by Martin J. Whitman
- Researching and writing a report on a portfolio company under the supervision of a Senior Orange Value Fund Analyst
- Assisting Senior Orange Value Fund Analysts in preparing their pitch and written reports
- Completing the following required courses
 - Financial Modeling for Investment Banking, Value Investing, Control Investing, Distress Investing

BPU Investments Management INC.

Summer Asset Management Intern

Pittsburgh, PA

Summer 2015

- Perform due diligence, researching new equity names for investment models while maintaining files on existing equity holdings utilizing Morningstar and S&P Capital IQ research databases
- Conduct research project on publically traded company Nordstrom Inc. and present my findings to the investment committee
- Assist in due diligence process by reviewing Request for Proposals to find a Small-Cap money manager for 401(k) plans and private clients
- Work closely with mentor to gain experience/knowledge on day-to-day operations in the financial advisory facet of the industry

Social at Bakery Square

Hostess/Busser/Food Runner

Pittsburgh, PA

Summer 2014-Present

- Create and manage serving sections and allocate covers amongst servers using the No Wait computer application
- Greet patrons upon arrival and seat them, take orders over the phone, and maintain open communication between co-workers
- Solve any issues and problems that arise by collaborating with co-workers to ensure maximum customer satisfaction

LEADERSHIP & OTHER ACTIVITIES

Kappa Kappa Gamma – Beta Tau Chapter

Treasurer

Syracuse, NY

March 2015-Present

- Prepare and manage \$500,000 chapter budget by educating members on semester-based installments through Billhighway
- Set up contracts and track individual member payments for membership, housing, and meal plans
- Serve on chapter council for our organization of nearly 200 women as well as member ex officio of the House Board
- Oversee all incoming and outgoing fees, including chapter payments to KKG National Headquarters and Beta Tau House Board

Syracuse University Investment Club

Research Team Leader

Syracuse, NY

May 2015-Present

- Work with fellow members to conduct research on the consumer discretionary sector and pitch findings to the club
- Attend weekly meetings to weigh in on current holdings and vote on their status
- Serve as an advocate for the Investment Club by reaching out to other women on campus interested in joining
- **Financial Management Association, Active Member:** Attend weekly meetings and participate in open forum
- **Enactus, Start Smart Project, Team Member:** volunteer to work with ESL students at local Syracuse middle school; tutor students in areas of math and currency

Interests: Skiing, tennis, bikram yoga and traveling

Skills: Proficient knowledge and use of Microsoft Office software and Excel

Anisa Khalouf

From Pittsburgh, PA, Khalouf is pursuing a double major in finance and accounting at the Whitman School of Management. An intra-university transfer into Whitman, she found an interest for finance through her coursework and took advantage of the opportunity to enhance her knowledge of the industry through OVF. Khalouf has served as a leader on campus within the organizations she works with. She currently holds a position on chapter council of her sorority, Kappa Kappa Gamma, as Treasurer and manages the chapter budget and finances for the house of nearly 200 women. She has also received a leadership role in Syracuse's Investment Club as a research team analyst and remains an active member of the Financial Management Association. During the summer of 2015, Khalouf spent six weeks in Madrid studying management in a global setting before interning at an asset management firm for the remainder of the summer, where she worked with both the financial advisory and institutional brokerage divisions of the firm. She wishes to use her leadership experience, work ethic and skills acquired from OVF to establish a career in investment banking.

Contact at: anisa.khalouf@orangevaluefund.com

JONATHAN A. PEATFIELD

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EDUCATION

Syracuse University

Martin J. Whitman School of Management | Maxwell School of Citizenship and Public Affairs

Majors: Bachelor of Science, Finance & Accounting | **Minor:** Economics

Cumulative GPA: 3.96/4.00 | **Honors:** Dean's List (All Semesters)

Syracuse, NY

Expected May 2017

WORK EXPERIENCE

The Orange Value Fund, LLC

Junior Analyst

Syracuse, NY

April 2015 - Present

The Orange Value Fund is a two-year money management and investment banking program, where students are trained to become both investment analysts and money managers while managing a \$4.1 MM portfolio using a deep value investment methodology similar in nature to Martin J. Whitman's "safe and cheap" approach

- Preparing research reports on portfolio holdings using relative and intrinsic valuation techniques under Senior Analyst mentorship
- Assisting Orange Value Fund Senior Analysts in tracking/analyzing periodic developments for current and potential fund holdings
- Completing mandated courses: Value Investing, Financial Modeling for Investment Banking, Control Investing, Distress Investing
- Achieving Bloomberg certification in equity, fixed income, commodities and FX

Sterling Asset Management Company, Inc.

Summer Intern

Colonie, NY

June 2015 - August 2015

- Prepared reports on news events which affected the equity, fixed-income, commodities and FX markets
- Performed research on potential investments and current holdings using SEC filings and equity research reports
- Analyzed investments using relative valuation techniques including comparable companies analysis
- Monitored client investment portfolios and created periodic financial performance reports using Microsoft Excel

Conti Appraisal & Consulting, LLC

Commercial Real Estate Analyst

Glenmont, NY

February 2011 - January 2014

- Conducted valuation analysis and prepared appraisal reports for 26 commercial, industrial and retail improvements ranging between 10K-200K square feet, valued between \$150K-\$7.5MM in NY, NJ and VT
- Researched local and macro markets; obtained comparable precedent sale and lease transaction data for market value derivation
- Formulated strategic cost/benefit analyses to determine highest and best use of undeveloped land
- Created current and pro-forma income statements and cash flow statements using Microsoft Excel
- Developed discounted cash flow, income capitalization and liquidation valuation models in Microsoft Excel

Malozzi Distributing Co., LLC

Wait Staff: Colonie Golf and Country Club

Rotterdam, NY

May 2012 - August 2013

- Displayed strong leadership, teamwork and communication abilities and was promoted to "front of house" wait staff
- Designed basic inventory control system and closing routine which increased organization and reduced inventory costs by 10%
- Trained staff and recruited 2 dependable employees, which decreased overtime labor costs and improved operational efficiency

LEADERSHIP EXPERIENCE

Delta Kappa Epsilon Fraternity; Phi Gamma Chapter

Vice President (Two Terms)

Syracuse, NY

August 2014 - Present

- Repaired external relationships and persuaded board of directors to avoid chapter shutdown and allow for organizational redesign
- Led implementation of restructuring effort during 2014-2015, which improved organizational image, reduced repairs & maintenance expense by 25% and increased revenue by 45%
- 2015 Delta Chapter Improvement Award recipient, awarded to the individual chapter whose improvement outpaced the remaining 49 DKE chapters during the 2014-2015 academic year

SKILLS

- Proficient in Cost, Income Capitalization & Sales Comparison Approaches to real estate valuation
- Microsoft Office Specialist: 2013 Excel Certification

JONATHAN A. PEATFIELD

Jonathan Peatfield is a double major in finance and managerial accounting at the Whitman School of Management. He is also pursuing a minor in economics at the Maxwell School. Jon has always been a quick learner, a driven individual and a problem solver. Growing up outside of Albany, NY, as the son of two small business owners, he was exposed to the business world at a very young age. He matured quickly and developed strong communication skills from constant interaction with clients and employees of his parents.

Jon's continued interest in business was spurred by his first high school economics class, which caused him to begin viewing the world from a business perspective. This new outlook positively impacted his decision-making skills and work ethic. After waiting tables throughout high school, he began working an administrative position at a real estate appraisal firm. There, Jon educated himself in basic finance and accounting principles including the different approaches to real estate valuation. He transitioned from answering phones and scheduling meetings to preparing reports and carrying out valuation analyses, spurring his interest in finance.

Jon first became interested in investment banking while carrying out credit analysis on a big-box retail tenant. The tenant was being urged by activist investors to merge with a competitor in the space. Jon followed the story daily and researched anti-trust regulation to better understand the likelihood of divestitures along with each potential merger opportunity. He applied this risk factor to determine market value of the property under the different merger scenarios. His interest in finance has grown through his continued work experience and his studies at Syracuse University.

At SU, Jon is a dedicated student and leader on campus. He has made Dean's List every semester, and has been elected to two consecutive terms as vice president of his fraternity, Delta Kappa Epsilon, acting as a driving force for positive change in the organization. This summer, Jon is working for an Asset Management company close to home. He looks forward to converting his work ethic, soft skills and experience in real estate valuation to the finance world to provide unique value to the Orange Value Fund, future internships and a career in investment banking.

Daniel Piccininni

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Education

Syracuse University Martin J. Whitman School of Management

Syracuse, NY

Bachelor of Science

Anticipated Spring 2017

Majors: Finance and Economics **Minor:** Global Enterprise Technology

GPA: 3.75, Majors/Minor GPA: 3.90 | Dean's List-All Semesters

Work Experience

The Orange Value Fund, LLC

Fall 2015-Present

The Orange Value Fund is a two-year money management and investment banking program, where students are trained to become both investment analysts and money managers while managing a \$4.1 MM portfolio using a deep value investment methodology similar in nature to Martin J. Whitman's "safe and cheap" approach.

- Completing the following course modules:
 - Value, Control, and Distress Investing, Introduction to Financial Modeling for Investment Banking
- Tracking holdings developments by listening to company conference calls, and reading relevant SEC filings
- Assisting Senior Analysts in developing quarterly and annual financial reports for the Fund

Gary Goldberg Financial Services

Suffern, NY

Trading and Investments Summer Analyst

May-August 2015

- Used Morningstar to model portfolios containing Mutual Funds, Stocks, and ETFs
- Back tested and optimized new investment strategies in Bloomberg going back at least 10 years
- Published a morning market snapshots pulling in premarket data from Bloomberg for Senior Analysts
- Wrote reports about major macro events and presented them to the Investment Committee

ICA Risk Management Consultants

Mahwah, NJ

Administrative Assistant

May-August 2014

- Worked closely with Associates to store files for 20 different client and meet any compliance demands
- Interfaced with clients to ensure company had the latest certificates of insurance on hand

Hudson River Adventures

Newburgh Waterfront

Lead Deckhand

May-August 2014

- Responsible for safety and satisfaction of up to 130 passengers
- Accountable for the actions of the other deckhands and service personal
- Managed training of new deckhands to ensure they had the necessary skills to safely carryout their duties

Activities and Leadership

Financial Management Association

Syracuse, NY

President

Spring 2014-Present

- Reach out to corporate partners and University professors to speak to the membership
- Implemented weekly email communications which resulted in an 50% increase in attendance
- Coordinated Wall Street Trip with Credit Suisse, Morgan Stanley, Citi, and EY for 12 students

Investment Club

Syracuse, NY

Chief Marco Research Officer

Spring 2014-Present

- Assess and manage the funds international exposure mainly through ETFs
- Successfully pitched a short Euro position the membership making approximately 10%

Golden Key International Honor Society

Syracuse, NY

President

Fall 2013-Present

- Set strategic goals for organization including new member recruitment and service projects
- Manage relationships with local organizations to plan and carryout community service events

Syracuse University Sailing Team

Syracuse, NY

- Active member of the racing fleet racing most weekends while taking 15 credits
- Practice twice a week and help new members learn how to sail

Fall 2013-Present

Boy Scouts of America

Fall 2013

Eagle Scout

Skills: Bloomberg Essentials Certification, Microsoft Excel 2010 certification, FactSet, Capital IQ

Hobbies: Hiking, Boating, Skiing, Coin Collecting, and Volunteering

Daniel Piccininni

Daniel's first experience in the business world came at a very young age when his parents, both accountants, taught him the importance of saving and spending money wisely. While he wasn't as interested in accounting he learned everything he could about business. As a Junior in the Whitman School of Management, he is double majoring in Finance and Economics with a minor in Global Enterprise Technology.

Dan is using his Economics major to learn about the financial markets from a macro perspective. He is taking classes in Real Estate Economics, and International Finance and Economics just to name a few. He supplements his classroom knowledge with real world examples by being the Chief Macro Research officer in the Syracuse University Investment Club. He has successfully pitched a short Euro position which returned 10% in a month and a half.

During the summer of 2015 he interned at Gary Goldberg Financial Services, a RIA in Rockland Country, NY. He worked in their trading and investments department. While there, Dan helped develop new investment strategies for the firm, and back tested all their strategies using data from Bloomberg. He also helped the Senior Portfolio Managers and the Chief Investment Officer asses the holdings to make sure they meet the funds objectives, and looked for new holdings that could compliment the fund.

Dan is the president of two campus clubs, The Financial Management Association (FMA) and Golden Key Honor Society. The FMA supplements what students learn in class by bringing in speakers and teaches students the soft skills they need to succeed when they enter the work place. Since the start of his sophomore year, Dan has been president of the SU Golden Key Honor Society Chapter where he makes sure the chapter's goals align with the national standards of Academics, Leadership, and Service.

From his scouting days, leading up to the rank of Eagle, Dan learned the value of helping others and doing community service. When he isn't in school he takes the time to go back to his Boy Scout Troop and help the younger scouts with advancement and their Eagle Projects.

James Ransom

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EDUCATION

Syracuse University

Martin J. Whitman School of Management, B.S. Finance
School of Information Studies, B.S. Information Management Technology
GPA: 3.24/4.0

Syracuse, NY
Anticipate May 2017

EXPERIENCE

The Orange Value Fund, LLC

Junior Analyst

Syracuse, NY
August 2014-Present

The Orange Value Fund is a two-year money management and investment banking program, where students are trained to become both investment analysts and money managers while managing a \$4.0 M portfolio using a deep value investment methodology similar in nature to Martin J. Whitman's "safe and cheap" approach.

- Completing required course including Value Investing, Control Investing, Distress investing, and Financial Modeling for Investment Banking
- Assist Senior Fund Analyst in their work
- Researching and writing a report on a portfolio company under the supervision of a Senior Orange Value Fund Analyst

App Partner LLC

Marketing/ Sales

Brooklyn, NY
Summer 2015

- Researched industry trends and statistics to create marketing materials to generate an increase in sales
- Surveyed the competitor landscape for analyzing the companies current position, thus establishing a benchmark to measure strengths and weaknesses in our pricing models
- Manually inputted 380 account and lead information into a new automated marketing platform within a three day deadline

LEADERSHIP

IMPRESS Program

Lead Peer Mentor

Syracuse, NY
Fall 2014- Present

- Mentor 145 freshman students on basic presentational skills, networking with faculty, selecting classes, and finding resources that will help facilitate their learning experience at Whitman
- Collaborated with faculty to improve the IMPRESS Program's future benefits after gathering feedback from students
- Developing new enterprises based on a corporate organizational structure in order to improve partnerships and team building among incoming students

Entrepreneurship Club

Co-President

Syracuse, NY
Spring 2015- Present

- Constructed the Club's corporate strategy outlining the vision, the organizational structure of the management team, their roles and responsibilities for smooth and successful transition into the new semester
- Developed a forum for partnering with various schools on campus, highlighting professor of student experiences for blog articles and speaker events to create a community of practice

VOLUNTEER SERVICE

Operation Treat for Troops

Founder

Marlboro, NJ
Fall 2007- Fall 2012

- Collected and donated over 1.2 tons of candy to troops in Iraq and Afghanistan
- Partnered with Keystone LLC to donate candy to achieve their goal of crafting 1000 care-package baskets

SKILLS & INTERESTS

Computer: Bloomberg Essentials Certification (Equity, Fixed Income, Commodities) & Microsoft Excel

Fall 2015

Interests: Golf, Guitar, Football, and International Travel

James Ransom

While working in a Mexican bistro for two years James has learned the importance of honesty and paid meticulous attention to detail. In a restaurant it is common to have mistakes in the kitchen and have it affect the customers. It is here that James crafted his personal skills by talking to customers in order to fix the orders and ensure a great dining experience. Taking the experience of the customer one step further, James developed a “what would I want” approach to his work. This allowed him to focus on specific problems in the dining area such as dusty fixtures, dirty salt & peppershakers, and old hot sauce bottles. He collaborated with management to improve the experience for the customer and make the restaurant more successful.

This work ethic has led James to pursue a dual degree in finance and information management and technology at Syracuse University. While taking a financial accounting course at Syracuse, part of the curriculum was to manage a one million dollar paper trading portfolio simulation. James quickly immersed himself in the market, exploring websites such as MarketWatch, Bloomberg, and Reuters. He enjoyed following companies in the news and keeping up with earnings reports. This led him to research the topics he was learning from reading up on the markets, which motivated him to learn outside of the classroom by reading Wall Street favorites such as *Reminiscences of a Stock Operator* and *Liars Poker*.

One of James’ greatest areas of interest is leadership. James developed a “why not me” attitude when it came to extracurricular activities. He sees this as an opportunity to learn outside the classroom. James enjoys stepping up into roles and taking the challenges that go along with it. In his freshman year he manages to earn a board position on the Entrepreneurship Club. This later developed into the role of Co-President in his sophomore year. It is through his leadership that James is learning how human capital is crucial to a company’s performance, and how a leader is supposed to analyze the underperforming areas of a company and apply assets in order to fix the situation.

It is through this hard work mentality and a passion for education that pushes James to work harder every day. By combining his leadership, dual degrees in finance and information management & technology, and his work ethic, James is crafting his skills to pursue a career in investment banking.

Brittany Rich

Brittany.Rich@orangevaluefund.com | (603) 593-2431 | 790 River Street Winchendon, MA 01475

EDUCATION

Syracuse University, Martin J. Whitman School of Management

Bachelor of Science in Finance and Accounting

GPA: 3.413

Expected May 2017

- Renee Crown University Honors Program
- Syracuse University Chancellor's Scholarship
- Dean's List Recipient - Fall 2013, Spring 2014, Fall 2014

PROFESSIONAL EXPERIENCE

The Orange Value Fund, LLC

First Year Analyst

Syracuse, NY

April 2015- Present

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- Achieving Bloomberg certification in equity, fixed income, commodities and FX
- Completing the following course modules:
 - Value Investing, Control Investing, Distress Investing, Introduction to Financial Modeling for Investment Banking
- Researching and writing a report on a portfolio company under the supervision of a Senior Orange Value Fund Analyst
- Assisting Senior Orange Value Fund Analysts in tasks including conducting company research and developing reports

General Electric Corporate

Fairfield, CT

Financial Management Program Intern

June 2015- Present

- Developing an understanding of the GE Global Operations migration and billing processes for financial planning purposes
- Creating a model that integrates migration status into the dollar impact amount and can be used in all GE regions worldwide
- Hold a leading role in the Intern Community Service Committee to help show GE's commitment to creating a better world

Brockway Dining Center

Syracuse, NY

Supervisor

August 2013- Present

- Work 20-30 hours a week enforcing policies and administering disciplinary action to maintain high employee performance
- Oversee the training of 65 employees in order to develop workers who can contribute to the team-oriented culture

Secretary

August 2013- Present

- Record all service records and inventory count sheets in FoodPro, an excel based record keeping database, on a weekly basis

LEADERSHIP EXPERIENCE

Phi Eta Sigma National Honor Society

Syracuse, NY

President

August 2014- Present

- Manage 325 members while assisting 10 other e-board members in establishing the society's membership requirements
- Establish a point system to keep track of current and future involvement and membership using Microsoft Excel
- Lead interactive meetings to encourage general body members to get involved with philanthropic and community events
- Wrote chapter regulations handbook to provide a more organized basis for running the organization for future generations

Ernst & Young Global Limited

New York City, NY

Emerging Leaders Program Participant

May 2015

- Attended leadership seminars and discussions to learn how to be a more effective speaker and employee in the workplace
- Studied various accounting careers to better my knowledge of how accounting impacts all aspects of a business

Office of Student Rights and Responsibilities

Syracuse, NY

Conflict Resolution Facilitator

January 2014- Present

- Provide an alternative method of conflict resolution to students who violate Syracuse University's Code of Conduct
- Teach students how to properly deal with feelings of aggression and misjudgment to help them avoid future misconduct

VOLUNTEER EXPERIENCE

Advocates Writing Center

Syracuse, NY

Volunteer Student Teacher

January 2014- Present

- Instruct poetry and creative writing workshops for adults within the local community who have disabilities
- Facilitate the improvement of writing and communication skills for 8 students to help enhance their level of literacy

AFFILIATIONS

- Delta Sigma Pi Professional Business Fraternity
- National Society of Collegiate Scholars

November 2014- Present

August 2013- Present

SKILLS

- Proficient with Microsoft Excel, PowerPoint, and Word
- Conversational in American Sign Language

Brittany Rich

As a first generation college student, Brittany proudly attends Syracuse University in the Martin J. Whitman School of Management studying both Finance and Accounting. Her interest in finance was initially driven by her first encounters with earning money in the real world. As a barista since the age of 15, and a financially independent student, Brittany has certainly learned the importance of utilizing and investing her own funds in the most efficient and profitable ways possible. In fact, it is this knowledge, when transferred over to the business world, that indirectly led Brittany to make Finance more than just an interest, and instead, an actual career.

In the summer of 2015, Brittany will be working as an intern for General Electric's Financial Management Program which is a condensed rotational program wherein she will be working closely with her financial planning and analysis team in Global Operations on understanding and standardizing the GE billing process. During this same summer, Brittany will also be attending Ernst & Young's Emerging Leaders Program in New York City where she hopes to gain more knowledge of accounting, as well as refine her communication skills and experience working with a team.

Aside from her studies at Syracuse University, Brittany tries to maintain a well-rounded and very involved presence on campus. She is the President of the Syracuse University chapter of Phi Eta Sigma National Honor Society, which engages in and encourages a great deal of community service and scholarship. She is a trained conflict resolution facilitator, a Whitman Ambassador tour guide for the School for Management, a member of the Whitman Women in Business Club, as well as a member of Delta Sigma Pi Professional Business Fraternity. In the past, she has been a Teaching Assistant for the Renee Crown University Honors Program, and she continues to do various community service work through this honors program as well.

Brittany is an erudite student who strives for success in all aspects of her work. As she continues along her career path, she will be looking into potential finance internships for the summer of 2016, which will hopefully lead her into a full time offer in her senior year at Syracuse University.

Brendon Rossmeisl

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Syracuse, NY 13210

Home Address:
28 Hooker Drive
West Hartford, CT 06107

EDUCATION

SYRACUSE UNIVERSITY

Expected May 2017

Martin J. Whitman School of Management

Bachelor of Science: Finance

GPA: 3.75/4.00

Honors: Dean's List (Fall 2013, Spring 2014, Fall 2014)

WORK EXPERIENCE

IL MAESTRO RISTORANTE

May-August 2014

Dining Floor Personnel

- Communicated with floor staff to provide customers with great service, quickly and efficiently.
- Handled multiple operational tasks concurrently.

TD AMERITRADE

December 2014-Present

Personal Portfolio

- Actively manage a personal stock portfolio using value-investing principles.
- Independently researched investments through the evaluation of 10-k filings and earnings conference calls.
- Conducted industry research to identify attractive and undervalued sectors.

ORANGE VALUE FUND LLC

April 2015-Present

- *The Orange Value Fund is a two-year money management and investment banking program, where students are trained to become both investment analysts and money managers while managing a \$3.9M portfolio using a deep value investment methodology similar in nature to Martin J. Whitman's "safe and cheap" approach.*
 - Achieving Bloomberg certification in equity, fixed income, commodities and FX
 - Completing the following course modules:
 - Value Investing
 - Introduction to Financial Modeling for Investment Banking
 - Control Investing
 - Distress Investing
 - Researching and writing a report on a portfolio company under the supervision of a Senior Orange Value Fund Analyst.
 - Assisting Senior Orange Value Fund Analysts in their work.

UNITED TECHNOLOGIES CORPORATION-PRATT & WHITNEY

June-August 2015

Group Strategy and Development Intern

- Assisted with research, and developed talking points for projects concerning the sustainment of the B-52 bomber engine.
- Assisted in the construction of presentations given to United Technologies corporate officers.
- Conducted market analysis on Pratt & Whitney's expansion into the Middle Eastern and South American markets.
- Conducted discounted cash flow valuations for target subsidiaries of Pratt & Whitney.

COMMUNITY SERVICE

SPECIAL OLYMPICS

2009-2013

- Organized the baseball station of West Hartford's Special Olympic Games.
- Ensured for a safe and fun environment for all the athletes and their families.

LEADERSHIP

SYRACUSE UNIVERSITY CLUB BASEBALL TEAM

September 2014-Present

Catcher

- Tasked with leading and ensuring clear communication between all position players during games.
- Planning and organizing team transportation for away games.

SKILLS & INTERESTS

- **Skills:** Proficient in Capital IQ, Excel, Word, PowerPoint and Outlook
- **Interests:** Baseball, Hiking, Fishing, Golf

Brendon Rossmeisl

Originally from West Hartford, Connecticut Brendon is a junior in the Whitman School of Management. While both of his parents were engineers Brendon decided to buck the trend and set out to find his place in the financial services industry. His grandfather, who is very involved in the stock and bond markets, heavily influenced this decision. Through teaching himself, listening to his grandfather's advice, and applying general accounting and managerial concepts from his classes Brendon felt knowledgeable enough to open his TD Ameritrade account last year. He found that he truly enjoyed the hunt to discover undervalued companies and the ever-changing nature of the financial markets. With persistent practice, he has been able to greatly increase his knowledge and understanding of the markets in general, as well as how to value individual companies.

During the summer of Brendon's sophomore year, he will be interning with Pratt & Whitney in a group strategy and development position. During this time he will conduct market and industry analysis to identify Pratt & Whitney's competitive advantages and shortfalls. In addition, he will be using a discounted cash flow model to generate approximate takeover or sale values of the company's subsidiaries.

Brendon also has a strong leadership background. In addition to being a three-sport captain in high school, he currently plays for the Syracuse University club baseball team as a catcher. The position has helped Brendon improve his critical thinking skills, putting him in a position to make major decisions quickly that could affect the outcome of the game.

Utilizing his experience and skills developed on the field, in the workplace, and in the classroom with the Orange Value Fund, Brendon will continue to work vigorously to attain a successful career in the financial services industry.

Matthew J. Switzer

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Syracuse, NY 13210

Permanent:

172 E. 14th St, Apartment B
Elmira, NY 14903

EDUCATION

SYRACUSE UNIVERSITY, Martin J. Whitman School of Management

Syracuse, NY

Bachelor of Science in Finance and Accounting

Expected, May 2017

GPA: 3.595/4.000

Honors: NSCS, Phi Eta Sigma, Dean's List, Dean's Scholarship

EXPERIENCE

The Orange Value Fund, LLC

Syracuse, NY

Junior Analyst

August 2015 - May 2017

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- Achieving Bloomberg certification in equity, fixed income, commodities and FX.
- Completing the following course modules:
 - Value Investing
 - Introduction to Financial Modeling for Investment Banking
 - Control Investing
 - Distress Investing
- Researching and writing a report on a portfolio company under the supervision of a Senior Orange Value Fund analyst.
- Assisting Senior Orange Value Fund Analysts in their work.

Horigan's Tavern

Elmira, NY

Waiter/Bartender

December 2012 - Present

- Responsible for preparing drinks, taking food orders, collecting money, and cleaning and stocking the bar
- Supervise operation of restaurant by scheduling phone reservations, maintaining wait list, and seating customers
- Use interpersonal skills to bring professionalism to special events including weddings and reunions
- Establish a pleasurable atmosphere through interaction, regularly resulting in the creation of new clientele

LEADERSHIP

DELTA SIGMA PI, Xi Tau Chapter

Syracuse, NY

Brother/Budgeting Committee Member

Fall 2014 - Present

- Participate in activities of the business fraternity including recruitment, fundraising and organizational planning
- Examine historical cost data and projected costs with the budgeting committee to forecast future expenses
- Create the fraternity's budget from current account information, forecasted expenses, and expected revenues

Syracuse University Investment Club

Syracuse, NY

Research Analyst, Industrials

Fall 2014 - Present

- Review holdings and economic conditions to help make decisions for a portfolio valued at more than \$150,000
- Evaluate the condition of both the Industrials sector and multiple Club positions within this sector
- Present findings, including sector and holding evaluations, to Club with recommendations for the portfolio

SKILLS

- Proficient in Microsoft Word, Excel and PowerPoint
- Microsoft Office Specialist Certified in Microsoft Excel
- Bloomberg Essentials certified in Equity, Fixed Income, Commodities and FX.

Matthew Switzer

Matthew's interest in Finance began in his early years, due in part to his goal-oriented mindset. At the age of 13, he asked family members to help him raise money to invest in the stock market, with the hopes of someday using the capital gains to help buy his first car. The lessons learned from this goal, one he eventually achieved three years later, serves today as the foundation for his passion for the financial industry, as well as a reminder of the rewards of hard work, meticulous planning and forward thinking.

Born and raised in Elmira, N.Y., Matthew's experiences growing up helped shape who he is today. While attending high school at Elmira Free Academy, Matthew was involved in many activities (including Scholastic Quiz Club, FBLA, and Student Government), took 39 college credits through dual enrollments with local community colleges, and was actively employed since the age of 14. These experiences helped develop his work ethic, time management, and interpersonal skills. Playing multiple Varsity sports allowed Matthew to express his natural competitive nature while working in a team setting.

Arriving at Syracuse University as a Dean's Scholar as well on private scholarship as a Finance and Accounting double major, Matthew has strived to match academic excellence with experiential learning outside the classroom. As such, he has sought to be actively involved on campus, contributing to organizations he is passionate about in roles that are suited to his natural skill set in quantitative analysis. He serves on the budgeting committee for the professional business fraternity Delta Sigma Pi, helping to manage the group's accounts and ensure day-to-day operations. He continues his passion for the financial services industry by serving as a research officer for the SU Investment Club, researching holdings and sectors and reporting findings to the Club. In his spare time, he likes to read to become more culturally versed, play a multitude of sports recreationally, and meet a diverse group of people through bartending.

While continuing his education on the financial industry under the tutelage of the Orange Value Fund, Matthew hopes his skillset, natural intellect and work ethic can allow him to positively contribute to the Fund, as well as help him secure employment making investment decisions in the Financial Sector.