

# Nico Pezzella

(917) 757-1697 | nico.pezzella@miami.edu | <https://www.linkedin.com/in/nicopezzella/>

## EDUCATION

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### University of Miami

*Bachelor of Science in Business Administration in Finance and Business Analytics*  
*Minor in Entrepreneurship and Architecture*

**GPA:** 3.98 / 4.0

**Honors:** President's Scholarship, President's Honor List, Provost's Honor List

**Coral Gables, Florida**

May 2019

### Xavier High School

**GPA:** 4.0 / 4.0

**New York, New York**

June 2015

## WORK & LEADERSHIP EXPERIENCE

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### Bank of America Merrill Lynch

*Global Wealth Management Advisory Intern; AMC Group*

**New York, New York**

June 2017 – Present

- Conducted research and analysis of mid-year reports for domestic equities, fixed income, alternative investments, and mutual funds for compilation in an investment matrix and assisted in determining performance of current holdings
- Prepared and analyzed performance summaries for 401(K)s and other retirement accounts, portfolio snapshots for all stock, bond, ETF, and mutual funds, income summaries, retirement projections, and annuity performance summaries for clients before biannual review meetings
- Analyzed client risk profiles, sector diversification, portfolio performance, rebalancing and allocation requirements, and new investment strategies
- Conducted a preliminary analysis of comparable securities to identify suitable replacements and options, using research from Morningstar and Bloomberg, for clients restricted from investing in certain securities and those seeking more active roles in portfolio management

### Hyperion Council

*Titan*

**Coral Gables, Florida**

October 2016 – Present

- Selected as one of six sophomores from the top 10% of the School of Business to offer consulting for local start-ups and non-profit organizations in order to accelerate the growth of new ventures
- Participated in the drafting of deliverables containing detailed business plans for assisting a new venture or improving an existing company's performance

### Milrose Consultants, Inc.

*Accounts Receivable Coordinator*

**New York, New York**

May 2016 – August 2016

- Created invoices, accounts receivable recaps, and statements of accounts for purpose of monitoring payment status and compliance with billing obligations
- Analyzed company data to amend discrepancies in payments for finished projects while ensuring correct and complete payment by coordinating with accounts receivable and payable managers
- Communicated with clients and vendors to detail payment status and obligations and researched letters of completion to justify services rendered

### Brookline Mechanical Inc.

*Part-time Assistant Project Manager*

**New York, New York**

January 2013 – May 2015

- Assisted project manager in daily responsibilities including audits of site plans for consistency with actual requirements, organizing of completed jobs for future search and identification, and communicating with employees regarding changes, absences, and substitution of workers
- Worked with project managers to coordinate trades of existing inventory and new merchandise, in addition to working with general contractors on the installation of relevant systems and equipment
- Assisted estimators in project reviews and pricing based on identified plans and existing equipment utilized and new purchase projections

## SKILLS, ACTIVITIES & INTERESTS

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**Certifications:** New York State Real Estate Salesperson

**Technical Skills:** Proficient in Wealth Management Workstation, QuickBooks, WAVE, Mi3, and Excel

**Activities:** Toastmasters International: Member/ Speaker; Rotary Club of Verrazano (Brooklyn Chapter):

Volunteer/ Benefactor; National Honors Society (Xavier High School): President; University of Miami Real Estate & Finance Association; Canes Investing Association

**Interests:** Antique and Exotic Cars, Real Estate, Traveling, Investing