STUART REID

MSc Finance | Wealth Management & Investment Research

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PROFESSIONAL SUMMARY

Finance graduate (MSc, May 2026) and former Deputy Portfolio Manager for the Shollmier Fund, pairing 13+ years of client-facing relationship management with formal training in portfolio construction, sector research, and financial modeling. Built a career on being the person clients trust to translate complex information into a decision they can act on. Pursuing FINRA Series 65.

EDUCATION & LICENSING

- Master of Science, Finance — University of Arkansas, Sam M. Walton College of Business — May 2026
- Coursework: Financial Data Analytics (Python), Portfolio Management, Investments, Fixed Income, Corporate Finance
- Co-authored academic work on “Centaur Finance” — human–AI collaboration frameworks in investment decision-making
- Built mean–variance optimized portfolios across a 5-stock universe in Python
- Bachelor of Science, Business Administration (Economics/Finance) — University of Arkansas — May 2012
- FINRA Series 65 — in progress (expected 2026) · Bloomberg Market Concepts (BMC) — certified

CORE SKILLS

Portfolio Construction · Equity & Sector Research · DCF Valuation · Comparable Company Analysis · Factor-Based Screening · Business Cycle Analysis · Fixed Income Fundamentals · Python (Pandas, NumPy) · Jupyter Notebooks · Advanced Excel & Financial Dashboards · Statistical Analysis · Mean–Variance Optimization · Research Writing · Investment Presentations · Process Improvement

PROFESSIONAL EXPERIENCE

Deputy Portfolio Manager — Shollmier Fund, University of Arkansas 2026

- Co-managed a 34-position, $880K AUM equity portfolio, contributing to sector allocation, position sizing, risk review, and rebalancing recommendations.
- Produced sector research on Financials and Energy supporting buy/sell/hold recommendations with valuation, macro, and portfolio-fit analysis.
- Presented quarterly performance results covering allocation changes, ticker-level contribution, and benchmark-relative results.
- Identified late-cycle sector signals and proposed defensive rotation recommendations.

Senior Asset Manager — Keathley-Patterson Consolidated Electrical Distributors, Springdale, AR 2017–2025

- Owned a portfolio of 20+ client relationships under a company-managed inventory program, applying lifecycle cost models to guide repair-versus-replace capital decisions.
- Built analytical structure integrating new data sources to inform client capital allocation and asset strategy.
- Negotiated client contracts and structured asset transactions.
- Served as primary point of contact for senior client stakeholders, translating technical analysis into decision-ready recommendations.

Senior Client Relationship Manager — RetailData LLC, Bentonville, AR 2017

- Managed high-impact accounts representing 5%+ of total company business through growth and transition.
- Delivered strategic recommendations and stakeholder communication that drove measurable client experience gains.
- Mentored team members and consistently exceeded KPIs across on-time delivery, data accuracy, and completeness.

Associate Business Manager, Competitive Pricing — Acosta Sales and Marketing, Rogers, AR 2012–2017

- Designed and managed an enterprise-level pricing database supporting strategic decisions that drove $3.5M+ in annual revenue growth.
- Conducted market, sales-trend, and competitor analysis to inform pricing strategy and profitability.
- Applied financial modeling and BI tools to optimize pricing structures and reporting workflows.