

**TOMÁS LUQUET VALLADARES**  
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**EDUCATION**

**University of North Texas** Bachelor of Business Administration; Finance Expected Graduation: Spring 2023  
GPA: Overall **4.00**

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**EXPERIENCE**

**Fidelity Investments** – Amendment Consultant; Westlake, TX January 2022 - Present

- Manage and own the amendments of employee sponsored 401k plans for small and medium cap clients
- Manage and sign off on high risk fund election changes for clients
- Collaborate with Fidelity's managing directors and client operations team in India to ensure that amendments are processed correctly and on time

**Fidelity Investments** – 401k Inbound Phone Agent; Westlake, TX November 2020 - January 2022

- Processed employee-sponsored 401k loans and withdrawals over the phone with customers
- Assisted exactly 6,500 individual customers with understanding their accounts and their loan/withdrawal options
- Founding member of Team Anderson's events committee where we planned monthly team events
- Collaborated with other departments to provide quality customer service
- Worked closely with my managers to review KPIs and sustain excellent performance

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**LEADERSHIP EXPERIENCE AND ACTIVITIES**

**UNT Student Investment Group** – Portfolio Manager January 2022 - Present

- Analyze the performance of the Student Investment Group funds in order to make decisions on the addition, liquidation, and allocation of holdings within the student-managed portfolios (1M+ AUM)
- Research macroeconomic and sector outlook to create custom screens that find new securities that fall within our investment guidelines. These securities are provided to Senior Analysts for further analysis during the semester
- Provide quarterly investment outlook reports to the board of directors consisting of UNT finance faculty, investment banking professionals, and private equity professionals

**UNT Student Investment Group** – Senior Financial Analyst May 2021 - December 2021

- Selected by the Portfolio Management Committee from a pool of eight candidates who completed the Analyst Program
- Guided analysts through analyzing 10-K and 10-Q financial statements, Bloomberg data, Industry specific conditions, and macroeconomic factors to create an investment thesis on our assigned company
- Managed three new analysts through creating a Discounted Cash Flow Model (DCF) in Excel and with presenting to the Board to decide whether to establish a position in the company within the student-managed fund

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**ACADEMIC PROJECTS**

**CFA Institute Research Competition** – Team Bridgewater December 2021 - February 2022

- Composed a detailed stock equity valuation report and presentation with two other teammates on CECO Environmental (US CECE)
- Selected by Professor Austin Hill-Kleespie to be on the team representing the University of North Texas
- Attended a private company presentation with the CEO and CFO to gather additional company information
- Analyzed public filings, industry outlooks, and company data to create a confident thesis for our valuation report
- Advanced to the Finalist round of the Southwest US region and competed against 7 other finalist colleges

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**HONORS/AWARDS**

- Fidelity Team Anderson Q1 MVP May 2021
- EAW Student of the Week May 2021
- President's List (4.0 GPA) Fall 2020 - Fall 2021

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**CERTIFICATIONS**

- Microsoft Excel Certification March 2022
- Bloomberg Market Concepts (BMC) October 2020

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**ADDITIONAL INFORMATION**

**Honor Societies / Organizations:** National Society of Leadership and Success, UNT Student Investment Group, UNT Chess Club

**Additional Skills:** Word, PowerPoint, Graphic Design, Bloomberg Terminal

**Interests:** Real Estate, Data analysis, Finance, Reading, Investing, Web Design, Music Composition, French

**Work Eligibility:** Eligible to work in the U.S with no restrictions