

ADAM MAREK

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 White Plains, New York

EDUCATION

- **Tulane University** | Bachelor of Science in Psychology | May 2024 Business Minor — Strategy, Leadership, Analytics | New Orleans, LA

CERTIFICATIONS

- SIE | Securities Industry Essentials (FINRA)
- Series 7 | General Securities Representative (FINRA)
- Series 66 | Uniform Combined State Law (NASAA) (encompasses Series 63)
- Client Engagement Certificate (Bloomberg)
- Global Markets Sales and Trading Analyst Certificate (Bank of America)
- Life & Health Insurance License (NYSDFS)

EXPERIENCES

FINANCIAL ADVISOR | EQUITABLE ADVISORS | NYC | JULY 2025 - JUNE 2026

- Generated approximately \$750K in new client assets across five client relationships by advising affluent clients on retirement planning, asset protection, and investment strategies while maintaining ongoing engagement through quarterly portfolio reviews.
- Conducted portfolio analysis to identify previously unrecognized risk exposures and inefficiencies, uncovering a client portfolio with 70% concentration in a single equity position and reducing unnecessary investment costs by restructuring solutions from 2%+ aggregate expenses to approximately 0.5%.
- Managed a pipeline of 200 prospective clients, leveraging consultative outreach, CRM management, and relationship-building strategies to identify qualified opportunities and drive new client acquisition.

CONSULTANT | THE NUCLEUS NETWORK | NYC | SEPTEMBER 2024 - JANUARY 2025

- Leveraged AI-enabled CRM capabilities to analyze a 2,000+ contact network, identifying potential strategic connections by matching stakeholder needs, company objectives, and industry overlap to uncover previously overlooked networking opportunities.
- Managed relationship operations within a founder-and-investor ecosystem, tracking stakeholder interactions and maintaining engagement records for entrepreneurs, operators, investors, and business leaders to support network growth.

CONTENT ASSOCIATE INTERN | MLB NETWORK | NJ | SUMMER 2022

- Produced and edited broadcast-ready content, including game recaps, highlight packages, and player features for MLB and Little League broadcasts, delivering assets within minutes of live game developments.
- Managed real-time editorial workflows across concurrent broadcasts, adapting to changing storylines while maintaining accuracy and attention to detail under strict deadlines.

INDEPENDENT EQUITY RESEARCH

- Conducted fundamental equity research and maintained ongoing coverage of a 15-position equity portfolio, developing and updating investment theses through analysis of earnings reports, financial statements, competitive positioning, and industry trends.
- Built valuation frameworks utilizing GAAP and non-GAAP earnings analysis, blended EPS estimates, and sector-specific forward P/E assumptions to assess intrinsic value and identify investment opportunities.
- Evaluated company fundamentals through analysis of balance sheet strength, competitive advantages, growth durability, and downside risks to determine long-term investment potential and thesis validity.

SKILLS

Investment & Analytical: Equity Research | Fundamental Investment Analysis | Financial Statement Analysis | Valuation Analysis | EPS Modeling | Investment Screening | Portfolio Analysis

Tools & Platforms: Excel | Salesforce CRM | eMoney | Claude | ChatGPT

Client & Relationship Management: Consultative Engagement | Needs Assessment | Risk Assessment | KYC/AML Compliance | Stakeholder Management | Professional Communication

Relevant Coursework: Financial Accounting | Microeconomics | Statistics | Organizational Behavior