JACOB FECTEAU

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Business Management student specializing in Finance with wealth management internship experience in portfolio analysis, investment research, and financial reporting. Currently preparing for FINRA's Securities Industry Essentials (SIE) exam.

EDUCATION

Stony Brook University · Stony Brook, NY **GPA: 3.54**

Bachelor of Science (B.S.) in Business Management | Finance Specialization

Expected Graduation January 2027

St. Anthony's High School · Melville, NY

August 2016 – 2020

St. Anthony's Leadership Team, Varsity Crew (Coxswain)

Relevant Coursework: Investment Analysis, Financial Management, Financial Analysis using Excel, Mergers and Acquisitions, Managerial Cost Analysis and Applications, Business Statistics, Business Communications, Principles of Finance, Information Systems in Management, Micro and Macro Economics

PROFESSIONAL EXPERIENCE

Main Street Financial Group | Wealth Management Intern

June 2026 – July 2026

- Entered and organized client portfolio data in YCharts, verifying holdings and account information for accuracy
- Supported portfolio analysis and investment research across stocks, ETFs, and mutual funds, with exposure to asset allocation and risk management
- Maintained organized client records and assisted with portfolio reporting for advisor review

McKenna Events | Event Operations Associate

May 2024 – Present

- Coordinated event setup and breakdown workflows to support efficient, timely operations
- Organized equipment and collaborated with team members to streamline preparation and cleanup

Open Minded Organics | Operations Lead

June 2022 – October 2024

- Directed daily production operations within a regulated manufacturing environment, ensuring compliance with industry standards
- Managed cost efficient inventory systems including supply tracking, stock replenishment, and product accountability across thousands of finished consumer goods
- Identified and implemented workflow improvements that reduced operational overhead and improved throughput, contributing directly to bottom-line efficiency
- Led cross functional project initiatives, coordinating timelines, resources, and team task allocation to meet production targets on time and within budget

Dick's Sporting Goods | Retail Associate

October 2020 – March 2023

- Processed and reconciled incoming inventory, maintaining accurate stock counts and supporting loss-prevention objectives
- Delivered consultative customer service to support purchasing decisions, contributing to departmental sales goals

CORE COMPETENCIES

Interpersonal Skills	**Investment Research**	**Portfolio Analysis**
Financial Modeling (Excel)	**DCF Valuation**	**Financial Statement Analysis**