

Nicholas L. Oldham
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EDUCATION

UNIVERSITY OF HOUSTON, C. T. Bauer College of Business, Houston, Texas
Master of Business Administration

May 2022

TEXAS A&M UNIVERSITY, College Station, Texas
Bachelor of Business Administration in Finance, GPA, 3.2/4.0

August 2017

PROJECTS

Member of Aggie Replant

2016-2017

- Organized 100+ volunteers during Brazos State Park recovery campaign, planting 1000 saplings.
- Led three teams of volunteers to plant 500+ trees as a part of Replant Day including overseeing job sites, planning logistics, setting up expectations, and delegating responsibilities.

EXPERIENCE

Charles Schwab, San Antonio, Texas

2020-2020

Brokerage Specialist

- Worked with 25+ clients daily to move client funds between accounts.
- Fielded inbound phone calls to place trade of \$50k daily average.
- Leveraged technical expertise to assist clients with navigation and functionality on schwab.com.

USAA, San Antonio, Texas

Licensed Investment Operations Specialist

2018-2020

- Prioritized members transfer requests by developing a thorough understanding of their needs and expectations.
- Expedited and processed member transactions by developing thorough knowledge of different companies and standards.
- Collaborated with members of all levels of financial knowledge to process an average of \$100k+ in asset transfers daily, averaging 20+ per day.

49 Financial, Austin, Texas

Fellow

2017-2018

- Strategized with clients to develop financial goals to obtain greater returns on financial portfolios.
- Developed and managed relationships with clients; Built a client base of 8-10 through personal connections and networking.
- Met and ran an average of 5+ meetings with potential clients a week.
- Created financial plans and recommendations based on needs of clients.

Trafigura, Houston, Texas

Oil Operations Intern

2016-2016

- Developed and Honed Excel, Macro and Pluto skills to track and assure quality of trucking operations.
- Oversaw QA of a Crude Oil Trucking Operation valued in millions of dollars to confirm deliveries and generate invoices.

Deals Desk Intern

2016-2016

- Created internal hedges on Nymex RBOB trades to protect physical assets in storage.
- Cataloged and rolled physical positions for 15+ storage tanks each month.

ADDITIONAL

FINRA Series 7 and Series 66 licensed

Bloomberg Certified

Excel, Macro, Pluto

Texas A&M Trading, Risk and Investment Program (TRIP)