

MATT SHERIDAN, CFA, CAIA

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EXPERIENCE

The Ohio State University

Senior Lecturer in Finance and Director of the Applied Finance Lab

Columbus, OH

2013 to Present

- Instruct undergraduate and graduate courses in Investments, Real Estate, Applied Financial Software, and Personal Finance, fostering a dynamic learning environment
- Created new courses, including Investment Philosophies and Strategies, Applied Financial Software, Honors Financial Data, Real Estate Appraisal and Valuation, and Honors Investments, contributing to curriculum enrichment
- Act as a representative of Ohio State in local and national media interviews, providing expert insights on current financial market events and personal finance topics
- Mentor Specialty Masters of Finance students aspiring to pursue careers in asset management, guiding their professional development
- Conduct specialized Market Data lectures for PhD, Masters, and Undergraduate students, enhancing their understanding of financial markets
- Manage financial databases for the Finance Department, ensuring accuracy and accessibility of crucial data used for academic research
- Serve as the Faculty Advisor for the CFA Research Challenge and Buckeye Capital Investors, overseeing student participation and contributions
- Recognized with Teaching Awards, including the 2022 Full-Time MBA Outstanding Elective Professor, the 2017 Max M. Fisher Faculty Eminence Award, the 2016 Pacesetter Award for Undergraduate Teaching Excellence, and the 2015 OSU Undergraduate Teaching Award for superior teaching in the finance major

Lobo Educational Finance, LLC

Founder and CEO

Columbus, OH

2015 – Present

- Content creator of digital modules in investing, corporate finance, and ethics for the Bloomberg CFA Exam Preparation Program
- Professional speaker at Education and Investing Conferences, delivering insightful presentations on financial topics
- Conduct independent financial portfolio reviews for high-net-worth individuals and families, offering strategic insights to optimize financial goals
- Currently in the process of developing a comprehensive undergraduate-level Investments textbook that seamlessly integrates theoretical concepts with practical applications
- Authoring a popular press book on personal investing to make financial literacy accessible to a broader audience
- Reviewer for various Investing and Personal Finance textbooks for major publishers, including McGraw Hill, W.W. Norton & Company, and Pearson

Bloomberg
Consultant- Fixed Income Buy Side Specialist

New York, NY
2009 to 2012

- Advised clients at hedge funds, investment banks, insurance companies, pension funds, endowments, and registered investment advisors on leveraging analytical data for informed and profitable investment decisions
- Managed Bloomberg Accounts across Connecticut, New Jersey, Ohio, and Pennsylvania, ensuring effective utilization of Bloomberg services
- Conducted advanced Bloomberg Equity and Fixed Income seminars for both Sell Side and Buy Side firms, contributing to client education and product knowledge

Cincinnati Financial Corporation
Fixed Income Portfolio Manager/ Credit Analyst

Cincinnati, OH
2007 to 2008

- Successfully managed an \$800 million bond portfolio, comprising investment-grade and high-yield bonds
- Conducted comprehensive analysis of new and existing fixed-income securities, informed by in-depth market research
- Invested in corporate bonds in both new issue and secondary markets
- Actively traded bonds in the secondary markets
- Utilized analyst reports, bond prospectuses, financial statements, and market data for thorough research that lead to profitable and informed investment decisions

BOK Financial
Assistant Vice President

Tulsa, OK and Albuquerque, NM
2004 to 2006

- Participated in the Accelerated Career Track Rotation Program, gaining exposure to Consumer Banking, Commercial Banking, and Investment Banking
- Managed in-store and standalone Consumer Banking Branches

EDUCATION

Chartered Financial Analyst

Chartered Alternative Investment Analyst

Masters of Business Administration – Finance

University of New Mexico, Anderson Schools of Management

Bachelors of Science in Business Administration

University of New Mexico, Anderson Schools of Management

Select Conference Presentations

Sheridan, M. R. (Presenter Only), Oral Presentation, Bloomberg NYC Education Symposium, "Using Bloomberg for Networking and Interview Preparation" (June 2018)

Sheridan, M. R. (Presenter Only), Oral Presentation, Shape the Future Conference, Bloomberg for Education, Chicago, "Using Bloomberg to compete in the International CFA Research Challenge" (July 2017)

Sheridan, M. R. (Presenter Only), Oral Presentation, Bloomberg Education Symposium, "Incorporating Bloomberg into the Curriculum" (May 2015)

Sheridan, M. R. (Panelist), Other, NYC Bloomberg Education Symposium, "Integrating Financial Data and Technology Into The Classroom", Panel. (June 2014)

Select Media Appearances

Print Media:

Andrews, Celia, "College Students Not Immune to Inflation", OSU The Lantern (December 2022)

Carr, Julie, "JD Vance's firm invested in food company now facing lawsuits", Associated Press (October 2022)

Hulsey, Lynn, "Job growth, moderating inflation spur hope amid recession fears" Dayton Daily News (August 2022)

Hulsey, Lynn, "What experts are saying: How is the economy doing in Dayton?" Dayton Daily News (August 2022)

Ohio State Insights, "Confused by recent stock market fluctuations?" Ohio State Insights Newsletter (February 2021)

"How to Apply for a Credit Card for the First Time" Time Magazine (November 2020)

"Find your financial footing" Ohio State Alumni Magazine (July 2020)

Murray, Seb, "Masters courses clear way for other credentials" Financial Times (June 2020)

"Why the rich go broke — and how you can avoid a similar fate" Ohio State Insights Magazine (October 2019)

TV Interviews:

Landers, Kevin, "Inflation reached a 40-year High" 10 TV CBS Columbus (February 2022)

Rosi, Cynthai, "Coinbases Direct Listing and the crypto landscape" NBC 4 TV Columbus (April 2021)

Varkony, Kristine, "Ohio State finance professor explains what's happening with Robinhood and GameStop" NBC 4 TV Columbus (January 2021)

Kallmeyer, Mike, "Crypto Currencies and a cashless society" In Focus with Mike Kallmeyer (March 2018)

Kallmeyer, Mike, "Regulating Short-Term Lenders" In Focus with Mike Kallmeyer (February 2018)

Marshall, Colleen, "Are the declines in the stock market cause for concern" NBC 4 TV Columbus (February 2018)

Revish, Jerry, "Stock Market Turmoil" 10 TV CBS Columbus (August 2015)