Nick Barran

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Summary

Finance student and CFA Level I candidate with a strong interest in Private Wealth Management. Experience supporting investment and credit recommendations, serving high-net-worth clientele, and communicating sophisticated financial concepts with clarity. Adept at synthesizing market research, portfolio considerations, and client objectives into tailored, actionable advice while fostering trusted client relationships.

Education

University of Washington – Foster School of Business — Seattle, WA
Bachelor of Arts in Business Administration, Finance | GPA: 3.75/4.00 — Sep. 2025 – June 2028

CFA Institute — Remote
CFA Level I Candidate — Sitting Nov. 2026

- Independently preparing across the full Level I curriculum, with emphasis on equity valuation, fixed income, and portfolio management

Bellevue College — Bellevue, WA
Associate of Arts & Sciences, Business Administration | GPA: 3.95/4.00 — Sep. 2022 – June 2025

Experience

The Well & Table – Host — Issaquah, WA
Full-service farm-to-table restaurant & bar — Aug. 2024 – Sep. 2025

- Coordinated curated wine-pairing showcase dinners in partnership with local vineyards, owning an elevated, high-touch experience for an affluent, discerning clientele
- Built rapport with repeat and high-spend guests as a first point of contact, managing reservations and inbound email, text, and phone communication with discretion
- Balanced competing front-of-house priorities with accuracy, discretion, and composure during peak service and special events in a fast-paced environment

Leadership & Competitions

Risk Management Association Case Competition – Team Lead — Seattle, WA
Credit & lending advisory case — Nov. 2025

- Led a team to 1st place out of 60+ competitors, advising a client on a tailored financing solution and presenting the recommendation to a panel of industry judges
- Assessed the client's full financial picture — liquidity, leverage, and cash-flow capacity — to structure a solution aligned to their goals and risk profile
- Translated complex analysis into a clear, client-ready narrative across a 20-slide recommendation and live Q&A, balancing rigor with accessibility

Alta Fox Small-Cap Stock Pitch Competition – Equity Research Analyst — Fort Worth, TX
Cross-border equity research — Jan. 2026

- Developed and defended a long investment thesis on a mispriced international equity, integrating DCF and comparable company analysis to support an actionable recommendation
- Evaluated an international issuer against U.S. peers by normalizing financials across jurisdictions — directly relevant to advising clients with cross-border interests

UW Corporate Banking Club – Member — Sep. 2025 – Present

- Engaged in weekly workshops on credit analysis, debt structuring, and client relationship management
- Completed a financial modeling workshop led by a Bank of America professional, building hands-on modeling and interpretation skills used in banking analysis

Skills & Additional

Technical: Excel (financial modeling, XLOOKUP, Index/Match, PivotTables); Python (pandas, NumPy)
Finance: Valuation (DCF, comparable company analysis), portfolio management, financial statement analysis, credit & risk analysis, capital markets
Projects: Built a Python tool for institutional-style valuation analysis, automating comparable company screening (EV/EBITDA, P/E) to support investment recommendations (github.com/nbarran)
Interests: Skiing, hiking, live music