

Matt Bates, CFA

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EDUCATION

Southern Methodist University, Cox School of Business

Dallas, TX

Master of Business Administration, Finance

May 2028

- Honors: Cox Merit Scholarship
- Energy Club, Finance Club

Washington and Lee University

Lexington, VA

Bachelor of Science, Accounting and Mathematics

May 2023

- GPA: 3.86 / 4.0, *cum laude*
- Honors: President's List 2020 – 2023, Beta Alpha Psi Honor Society

EXPERIENCE

Goldman Sachs

Irving, TX

Associate, Wealth Services

Jan. 2026 – Aug. 2026

- Advised a portfolio of 100+ clients, offering expertise in full-scope financial planning spanning investment allocation, equity compensation, tax optimization, retirement, and estate continuation strategies
- Designed 11 custom company-specific program guides that advisors used to plan with their clients, improving both client satisfaction and retention
- Ideated, drafted, and reviewed 50+ client-facing articles as part of the department's initiative to overhaul digital offerings, successfully adding 15+ final articles to the main client portal
- Spearheaded initiative to leverage proprietary AI tools for developing weekly internal market reports summarizing economic data, Federal Reserve policy developments, market trends, and GS outlook
- Mentored 10+ junior colleagues, creating opportunities for them to differentiate themselves within the department such as presenting market insights during team meetings

Analyst, Wealth Services

Jul. 2023 – Dec. 2025

- Completed 1,600+ financial planning appointments, ranking among the top 5 out of 70+ advisors in appointment volume in 2025
- Maintained 100% client satisfaction and likelihood to recommend the service over 51 surveys in 2025
- Selected by senior management to work with VIP clients and speak on complex executive compensation topics such as deferred compensation packages
- Surpassed Analyst quality benchmarks, achieving Associate standards in performance reviews within the first quarter of working with clients
- Led 4 department-wide group trainings on company-specific benefits and financial planning topics, increasing advisor competency across complex stock compensation plans (ISOs) and investment products

PROJECTS

Washington and Lee University

Lexington, VA

Project Leader, Washington and Lee Student Consulting (WLSC)

Oct. 2020 – Dec. 2022

WLSC offers pro bono consulting services to both for-profit and nonprofit businesses. Acted as the primary point of contact with clients and delegated responsibilities to best utilize team members' strengths.

- Managed teams of up to 6 students developing and presenting tailored reports on project findings, recommended actions, and implementation guidance to client organizations' board of directors
- Developed a go-to-market strategy for a Baltimore-based biotechnology startup, identifying the need to pivot to a less saturated target market and delivering a strategy for a successful transition
- Strategized the successful rebranding of a Virginia-based storage company including creating a targeted marketing campaign to capture an estimated additional 25% of the target market

ADDITIONAL INFORMATION

- CFA Designation: CFA® charterholder, CFA Institute (2026)
- Licensing Exams: Series 7, Series 66, Series 3
- Technical Skills: Advanced Excel and PowerPoint, Bloomberg Terminal, Capital IQ, FactSet, DCF and LBO valuation, commodity futures
- Interests: NFL and fantasy football, trivia, weightlifting, cooking