

Doug Nadel

nadel.12@osu.edu | (973)-986-4630 | linkedin.com/in/doug-nadel/

EDUCATION

The Ohio State University, Max M. Fisher College of Business

Bachelor of Science in Business Administration

- Specialization: Finance

Columbus, OH

May 2027

WORK EXPERIENCE

The Glenmede Trust Company

Wealth Advisory Intern

Princeton, NJ

June 2026 – August 2026

- Examined trust and estate documents to extract key provisions, beneficiary information, and age attainments, summarizing findings into account synopses for client families while gaining exposure to estate planning structures and fiduciary practices
- Reviewed Performance Composite Outliers for the trailing twelve months by analyzing client asset allocations looking for over/underweighting across asset classes and individual holdings, developing detailed write-ups with comments and forward action plans, ultimately reviewing with portfolio managers
- Created Compass, an AI agent for wealth advisors to use as a post-meeting assistant, composed of a structured knowledge base made up of relevant firm resources, markdown files, decision rules, and guiding frameworks; ingested advisor inputs such as trust documents, meeting notes, transcripts, and ultimately diagnosed a client's situation while surfacing appropriate resources

Elevation Wealth Partners

Portfolio Management Intern

San Francisco, CA

June 2025 – August 2025

- Analyzed individual equities across consumer, industrial, and technology sectors including Palantir, Deckers, Stanley Black and Decker, ADT, and Lamb Weston
- Conducted industry research to compare companies against their peers and identified relative strengths and risks
- Analyzed and forecasted financial statements and financial ratios; developed valuation metrics and utilized discount cash flow models to determine the stock's investment worthiness
- Collaborated with a senior wealth advisor to build a financial plan for a \$5M high-net-worth client including budgeting, college savings, planning for retirement, and developing an investment portfolio utilizing Morningstar

Pride Products Distributors

Business Development Intern

Livingston, NJ

May 2025 – August 2025

- Developed inquiries with existing and new clients through various methods of outreach including 40-60 cold calls per day and personalized email drip campaigns; specifically targeted law firms and their marketing, recruiting, and event teams
- Used CRM to record and update 300+ client interactions, leads, and sales analytics while performing market research and prospect screening to evaluate potential clients based on size, industry, and growth potential

EXTRACURRICULAR EXPERIENCE

TAMID Group

Director of Fund

Columbus, OH

September 2023 – Present

- Lead weekly educational sessions for over 30 students covering equity valuation, DCF modeling, and investment thesis development equipping members for real-world investment roles and competitions
- Oversee stock pitches and guide members through company selection, industry research, and financial analysis to support investment decisions for TAMID's global portfolio of over 60 securities

Morning Memo

Founder

Barcelona, ES

January 2026 – April 2026

- Built and launched an AI-powered personalized daily newsletter platform using Claude Code, Supabase, and Resend, delivering ultra niche daily content to each subscriber based on their selection from news and finance all the way to trading cards and stolen art repatriation
- Grew platform to 65+ active subscribers through independent outreach, actively iterated on the product numerous times through user feedback and demonstrated end-to-end AI-driven product development