Contact

(928) 221-7743 (Mobile)
mhaertzen@gmail.com

www.linkedin.com/in/mhaertzen (LinkedIn)

Top Skills

Portfolio Management
Investments
Valuation

Certifications

Chartered Financial Analyst
Certified Financial Planner (CFP)

Honors-Awards

Eller Online MBA Most Valuable Professor Award
Eller Online Business Administration - Outstanding Faculty Award
Eller Online MBA Most Valuable Professor Award
Eller Professional MBA Most Inspiring Professor Award
Eller Professional MBA Best Core Class Award

Publications

An Investment Analysis of Honduran Teak Plantations
Investing - Challenging Times

Matthew J. Haertzen, CFA, CFP

Senior Lecturer of Finance at the University of Arizona - Eller College of Management
Tucson, Arizona, United States

Summary

Experienced educator and investment professional with a demonstrated history of working in the higher education industry. Skilled in Asset Management, Mutual Funds, Corporate Finance, Investment Management, and Alternative Assets. Strong consulting professional.

Experience

Cornerstone Portfolio Research
Portfolio Manager, Outsourced Chief Investment Officer
July 2022 - Present (1 year 5 months)
Remote

Provide portfolio management and investment research functions to independent RIA's allowing them to focus on managing and developing client relationships. Develop customized portfolio solutions to meet their unique individual clients need.

University of Arizona - Eller College of Management
Senior Lecturer of Finance
June 2017 - Present (6 years 6 months)
Tucson, Arizona Area

Teach finance and investment courses to undergraduate and graduate students.

WT Wealth Management
Senior Investment Advisor Providing an Education Focused Financial Planning Approach
January 2018 - June 2022 (4 years 6 months)
Tucson, Arizona Area

WT Wealth Management is an SEC registered investment adviser, with in excess of $100 million in assets under management (AUM) with offices in Flagstaff, Scottsdale, Sedona and Tucson AZ.

Osher Institute at University of Arizona
Volunteer Instructor
September 2018 - May 2021 (2 years 9 months)
Tucson, Arizona Area

Teach several investment related classes in both Tucson and Oro Valley.

Four Peaks Wealth Management
Founding Partner and Chief Executive Officer
January 2013 - December 2017 (5 years)
Flagstaff, Arizona Area

Four Peaks Wealth Management, LLC is an independent, employee owned investment management firm dedicated to providing institutional asset management for the individual investor.
* Managed a global tactical asset allocation portfolio on behalf of individual investors.
* Developed marketing material and promoted the Four Peaks investment management product.

Georgia Biofuels, LLC
Consultant
September 2011 - December 2017 (6 years 4 months)
Flagstaff, Arizona Area

Provided financial modeling support for a wood pellet production facility.
* Worked with potential investors to assist in fundraising to move the $80 million project forward.

Northern Arizona University
Senior Lecturer of Finance
August 2008 - May 2017 (8 years 10 months)
Flagstaff, Arizona Area

Taught a wide array of investment courses to undergraduate and graduate students.
* Specialties included investments and portfolio management.

Cogent Partners
Chief Investment Officer - Timber
June 2005 - April 2013 (7 years 11 months)

Dallas/Fort Worth Area

Portfolio Manager for a publicly traded investment vehicle designed to invest in a global timber portfolio for high net worth and institutional clientele.

* Successful IPO in February 2007 raising in excess of $200 million USD.
* Reviewed day-to-day investment decisions based on detailed financial analysis and modeling.
* Oversaw a global group of strategic forestry partners who source deals and manage the timberland.
*Served as a subject matter expert in both marketing and client service capacities.

Beyond Forestry, Ltd.

Director

January 2009 - June 2012 (3 years 6 months)

Portfolio management and investment analysis for accelerated growth Panamanian teak plantations.

* Performed due diligence and negotiation with a strategic partner to manage the plantations in Panama.
* Led development of marketing material and strategies.

Wyoming Lawyers

Expert Financial Witness

March 2008 - June 2008 (4 months)

Rock Springs, WY

Evaluated the financial implications of various interpretations of a series of contracts between the client, his employer, and a family member.

* Completed recommendations as to the intended meaning of certain financial terms, and provided a workable glossary of key financial items to facilitate the courtroom discussions.
* Prepared to offer testimony of behalf of the client. Testimony was not needed as the written report led to an out-of-court settlement.

Idaho Endowment Fund Investment Board

Chief Investment Officer

January 2003 - May 2005 (2 years 5 months)

Chief Investment Officer for the $835 million Idaho Endowment Fund, $385 million Idaho State Insurance Fund, and the $55 million Idaho Judge's Retirement Fund.

Washington Trust Bank

Vice President, Equity Portfolio Manager
March 2001 - December 2002 (1 year 10 months)

Managed equity investments for $650 million in separate account assets.

University of Minnesota
Assistant Director, Office of Asset Management
March 1999 - March 2001 (2 years 1 month)

Responsible for overall investment management of the $800 million University Endowment Fund.

Ameriprise Financial
Manager, Structured Products Quantitative Support
April 1994 - March 1999 (5 years)
Greater Minneapolis-St. Paul Area

Managed a staff of three quantitative analysts supporting a product line of $10 billion.

Education

University of Minnesota - Carlson School of Management
M.B.A, Finance · (1993 - 1994)

Penn State World Campus
Graduate Certificate in Applied Statistics · (2015 - 2016)

University of Minnesota Morris
BA, Business, Economics · (1990 - 1993)