

# Nicholas Wilson-Thayer

Regional Investment Consultant

Boston, MA, United States | [LinkedIn](#)

Regional Investment Consultant at Fidelity Investments advising financial advisors on portfolio construction and product positioning across Southwestern CT and the greater NY area. Santa Clara University economics graduate with prior internships in investment analytics, real estate, and public-sector finance.

## EXPERIENCE

**Regional Investment Consultant** Jun 2024 — May 2025

Fidelity Investments

- Build consultative relationships with financial advisors across major firms in CT/NY, helping them optimize Fidelity products and grow their practices.
  - Analyze advisor portfolios to assess asset allocation, risk exposure, and product alignment, identifying growth opportunities and advisor pain points to deliver strategic, client-focused recommendations.
  - Leverage expertise in Mutual Funds, ETFs, SMAs, model portfolios, alternatives, and crypto to support product positioning and advisor education.
  - Stay current on capital markets and macro trends to help advisors make informed decisions and enhance client outcomes.
- Northeast Team Quality and Execution Award:
- 107% attainment of territory revenue goal, above-target performance on all 14 tracked KPIs, and top-quartile rankings on 11 of those 14 across our Texas and Rhode Island offices.

**Business Analytics and Insights Intern** Jun 2023 — Aug 2023

Fidelity Investments

*Boston, Massachusetts, United States*

Created data-driven reports and presentations supporting investment strategy alignment and executive decision-making. Analyzed KPIs and led cross-functional data projects to improve workplace investing strategies.

**Real Estate Project Intern** Aug 2022 — Dec 2022

Valcambre

*Seville, Andalusia, Spain*

Ran weekly market analysis and rental pricing in Excel and supported operational logistics in bilingual settings. Researched property tech, market trends, and expansion opportunities.

**Finance Intern** Jun 2022 — Aug 2022

Massachusetts Water Resources Authority

*Boston, Massachusetts, United States*

Analyzed bond portfolios ranging from \$6M to \$600M and capital budgets using financial models. Supported bond defeasance efforts and interest rate reduction initiatives.

**Real Estate Intern** Jun 2022 — Aug 2022

Coldwell Banker Realty

*Boston, Massachusetts, United States*

- Assisted lead agents in the showing of open houses
- Actively communicated with sellers, buyers, and renters to understand property needs, timeline, and budget
- Efficiently marketed and advertised on-market and off-market properties generating thousands of viewings

**Commission Sales Associate** Mar 2020 — Oct 2020

Vector Marketing

## EDUCATION

**Universidad Pablo de Olavide** Aug 2022 — Dec 2022

*Economics*

**Santa Clara University** Sep 2020 — Jun 2024

*Economics*

GPA: 3.52

**Newton South High School** Sep 2016 — Jun 2020

*High School Diploma*

GPA: 3.5/4.4; High Honor Roll (2019-2020); two-time D.E.C.A. District Competition Winner; two-time D.E.C.A. State Competition Qualifier; D.E.C.A. International Competition Qualifier (2018-2020)

## CERTIFICATIONS

**Series 63, FINRA** Sep 2024

**Series 7, FINRA** Aug 2024

**Securities Industry Essentials (SIE), FINRA** Jul 2024

## **SKILLS**

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Project Management · Portfolio Analysis · Asset Allocation · Investment Strategies · Capital Markets · Client Relations · Consulting · Data Analysis · financial analysis · portfolio construction · risk analysis · Microsoft Excel · PowerPoint · Outlook · Word · Windows · public speaking · financial literacy · LEED Green Associate · SIE · Series 7 · Series 63