Nicholas C. Wankier

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EXPERIENCE

Elevation Point (*$13B AUM)* — Newport Beach, CA
Vice President, Platform — Apr 2025 – Current

- Owner of platform relationship for nine partner firms from onboarding through steady state to self-sufficient operation
- Author of partner firm onboarding-to-independence playbook for asset migration, systems configuration, and upsell points
- Architect and deploy each partner firm's core technology stack across reporting, trading, advisor billing and CRM systems
- Utilize Addepar to assist 21 financial advisors across Elevation Point with custom performance reporting and client portals
- Build Elevation Point executive leadership dashboards measuring net cash flow and solution adoption across partner firms
- Translated 6x AUM growth ($2B to $12B) into headcount and infrastructure requirements, scaling the platform team to match
- Drove a 9% adoption rate in alternative investments through PeakAlts by providing bespoke marketplace access and reporting
- Project lead for building an MCP-based intelligence layer with Milemarker, enabling agentic workflows in natural language
- Built an automated model/product recommendation workflow pulling from client risk score and allocation preferences
- *Select Transactional Experience*
  - **Project Eclipse**: Partner firm acquisition resulting in ~$1.7B of transferred AUM and ~$7.5mm in net advisor revenue

THECE Wealth Management — Newport Beach, CA

- *Founding Member* — Nov 2024 – Mar 2025
- Hand selected by exiting partners of Corient to support creation of RIA focused on alternative investments
- Assisted in the pricing negotiations with equity and fixed income managers for THECE's developing investment platform
- THECE Wealth Management faced numerous legal issues *(Corient Services v. Jacob Halladay)* and paused business activity

Corient *($6B AUM)* — Newport Beach, CA
Advisory Analyst — Jun 2024 – Nov 2024

- Assisted a team of seven financial advisors with portfolio creation and management for ultra-high net worth clientele
- Provided due diligence requests and fund updates as the lead communicator between alternative fund managers and clients
- Lead over Bloomberg based model for an equities strategy targeting dividend growth stocks with ~$230M invested
- Implemented VBA code in firm-wide investment proposal tool to automate hypothetical portfolios and deployment schedules
- Conducted sourcing campaign focused on fundraising founders which resulted in ~$15M in new business
- *Select Transactional Experience*
  - **Project Dot Me:** Provided liquidity to a family office through a secondary tender offer led by Ribbit Capital
  - **Project CAA:** Participated in a defense tech's $1.5B Series F funding round, valuing the company at $14B

Future Standard *($73B AUM)* — Darien, CT
Private Equity Summer Analyst — May 2023 - Jul 2023

- Generalist intern across Portfolio Advisors' product groups: Primaries, Secondaries, and Private Credit
- Contributed to 40+ deal screens, 20+ in-depth IC memos, and 20+ slide decks that evaluated investment potential
- Created and presented GP-led transaction overviews for a multi-asset continuation vehicle valued at ~$700M

EDUCATION

Brigham Young University – Marriott School of Business — Provo, UT
Bachelor of Science in Finance — Apr 2024

- GPA 3.9 / 4.0
- *BYU Marriott School of Business Dean's List* (Top 5% of Marriott School Students)
- *Marriott School of Business* Finance Student Career Coach assisting with job placement and individual tutoring
- Active member of *BYU's Investment Banking Association* and *Private Equity and Markets Association*

LEADERSHIP & SERVICE

MAJI Global Non-Profit — Orem, UT
Service Activity Coordinator — Feb 2021 – Apr 2024

- Co-directed fundraising as a 501(c)(3) organization and donation allocation for monthly service projects
- Coordinator of semiannual service trip to Rancho La Hermosa in Tijuana, Mexico for 50+ volunteers

AWARDS, SKILLS & INTERESTS

- Skilled in Excel and Powerpoint with additional experience in Addepar, Pitchbook, Bloomberg, Snowflake, SQL, and Power BI
- Built projects using Claude Code including a custom Guitar Hero game and a CarPlay alternative (GitHub:NickWank)
- Completed two-year service mission in Wichita, Kansas teaching Christian principles in the Spanish language
- Avid Hip-Hop sample seeker, Ironman 140.6 finisher, and passionate skier of Honeycomb Canyon