



Matthew Roskoff

Wealth Management Analyst

Matthew Roskoff of Greenwich, CT, is a Wealth Management Analyst who supports colleagues and clients with financial research and modeling skills that analyze various investment vehicles' economic performance and risk factors. As a Hobart and William Smith Colleges graduate in Geneva, NY, Matthew majored in history and finance. Both demonstrate Roskoff's passion for using concrete facts to analyze complex events, even in financial markets.

Growing up in Greenwich, Matthew Roskoff enjoyed a lifestyle that exemplified both small-town community and metropolitan sophistication. He still enjoys a social life deeply connected with the vibrant downtown entertainment district and embraces New England's lush backcountry and stunning shorelines. Roskoff's goal is to eventually pivot into a comprehensive financial wealth management venture that advises families and individuals on estate planning, investment strategies, retirement planning, and tax consultation.

EDUCATION

After graduating from high school, Matthew Roskoff chose to attend Hobart and William Smith Colleges, a liberal arts and sciences institution renowned for preparing students for highly successful careers and a higher quality of life due to the outcomes-based focus of the school's curriculum. As a finance major, Matthew sought to discover how data analysis could improve an individual's or corporation's financial stability. His studies included investment strategies and how capital allocation and risk management function as financial stabilizers during times of economic downturn.

Roskoff was a member of the Hobart Finance Group, the school's oldest financial investment club. The group allows finance majors to apply critical thinking skills, financial technologies, and investment banking practices to real-life scenarios while leveraging collaboration and information-sharing. He is also a skilled club lacrosse player and a member of the People to People Ambassador Program, a club that promotes cultural exchange programs, international friendships, and global educational opportunities.

Matthew is proud of his volunteer work during college, especially his service at Calvary Hospital's Annual Café Noel Party, where patients with advanced cancer diagnoses can enjoy a superior holiday experience.

CAREER IN FINANCE

Matthew Roskoff of Greenwich began his career in retail at a high-end leisure wear retail outlet, Vineyard Vines. He honed his customer service skills here, handling anywhere from 50 to 100 customers daily. However, he desired to apply his college education in financial and analytical principles in a career position, so he pivoted into the automotive services industry as a Fleet Analyst for Point Pickup Technologies. His role included using digital platforms and data analysis skills to optimize the company's fleet of vehicles. His work often resulted in lower overhead costs, better logistics and fuel efficiency, and improved fleet operations.

Roskoff served as a Wealth Management Analyst at Cronin Capital, a company specializing in asset management, including custom-tailored real estate solutions. The firm is also experienced in brokering luxury assets such as fine art and rare wine with strategic partners. Matthew worked to create and implement long-term asset allocations that would assist clients in building and preserving their financial wealth. He accomplished this by researching economic trends,

financial markets, and various financial products such as stocks, bonds, and funds. Matthew is an expert at applying financial modeling to prepare reports, proposals, or presentations illustrating the client's financial portfolio.

ROLE AS FINANCIAL ANALYST

As a resident of Greenwich, Matthew Roskoff has taken the opportunity to advise many private, high-net-worth individuals and affluent families on ways to preserve and increase wealth for future generations. He enjoys conducting financial research and creating basic financial models that use numerical techniques to forecast future growth. Roskoff is skilled at studying balance sheets and income statements. He uses this client information along with future economic predictions to determine possible risks or financial growth.

Roskoff suggests that anyone looking to become a financial analyst learn about financial products, stay abreast of economic trends, and explore how market conditions can positively or negatively affect the performance of current portfolio holdings. Matthew has become an expert in complex financial concepts and investment strategies to clearly understand how the client's money should be managed. For him, it all begins with economic research and market analysis to assess a fund's financial health and to manage the client's risk tolerance versus investment performance.

Roskoff also analyzes a client's financial portfolio to determine whether the company's wealth optimization strategies are performing well. A wealth-building advisor always seeks to provide investment recommendations that fulfill the client's long-term goals. To accomplish this, they must evaluate investment products, create a wealth-building strategy, and consider the right investment strategies. This all rests on the quantitative analysis performed by Roskoff, which can assess the performance of the client's investment portfolio.

Collaborating and communicating with clients and external partners is key to optimum investment services. Roskoff may speak with legal professionals, tax advisors, certified public accountants, or portfolio managers to get a clearer vision of financial products that may be used in detailed presentations and reports to the client. This attention to detail and accuracy make Matthew Roskoff, a Greenwich-based wealth analyst, crucial to wealth-building strategies.