

Nicholas T. Perini, CFA - Vice President



Nicholas joined Beese Fulmer in 2010 and currently serves as Vice President, Portfolio Manager, and Analyst. Nick is also a Partner and the Chief Compliance Officer at Beese Fulmer. Nick specializes in working with high-net-worth and ultra-high-net-worth clients by building customized portfolios for each unique investor's needs. Nick collaborates with other members of the firm along with outside accountants and attorneys to maximize the sale of client's privately-held businesses and efficiently pass down generational wealth.

Every client at Beese Fulmer has unique needs and that is why we take the time to build customized portfolios for each of our clients. Part of developing a new client portfolio is educating and working with the client to make sure they understand what we do and why we do it. Understanding how behavioral finance affects a client's decision-making is of particular interest to Nick. Bridging the gap between the human brain's programming to make irrational financial decisions, and being a rational investor, has become a crucial topic of conversation between Nick and his clients.

Nick resides in Hudson with his wife Jillian, and two children – Lido and Vera. When not at work or helping the Deville School of Business, he enjoys golfing, skiing, and trying new restaurants and recipes with friends and family.

Experience

Prior to joining Beese Fulmer, Nick spent five years in institutional investment management at North Fork Bank in New York. While at North Fork Bank he was an analyst and member of the investment committee. Nick worked with a wide range of clients including pensions, trusts, union accounts, and high-net-worth individuals.

Education

CFA charter holder, CFA Institute, awarded 2012

M.B.A., Case Western Reserve University Weatherhead School of Management, 2010
- Impact Scholar in Finance

B.S., Business Administration, Bucknell University, 2003

Civic Involvement & Awards

Board Member/Past President – CFA Society of Cleveland

Mentor to Walsh University CFA Institute Investment Research Challenge Team

Advisor to Walsh University Student Managed Investment Portfolio

Past Board Member – First Tee of Canton

Past Board Member – Rotary Club of Canton

Past Member – Weatherhead School of Management Alumni Advisory Council

Twenty Under 40 Award Winner – Presented by ystark & the Canton Regional Chamber of Commerce

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