

Stefan Scott Hatfield

Gramercy, New York City, NY

stefanhatfield.com | hatfieldsstefan@gmail.com | 865-771-3048

Summary

Relentlessly curious and constantly learning, I bring a strategic and analytical mindset shaped by experience in Wall Street research, combining deep market analysis with rigorous financial modeling, data science, and a talent for distilling complex concepts into clear, persuasive research, pitches, and actionable investment ideas. Proven leader in driving process innovation, building analytical infrastructure, and supporting cross-functional initiatives across trading, research, and strategy teams. Passionate about creating tools, workflows, and teams that accelerate decision-making and unlock scalable impact.

Core Skills

Fundamental Modeling and Forecasting

Dashboarding & Reporting

Equity Markets and Derivatives

Quantitative Programming/Automation

Operational Strategy & Process Leadership

Technical Writing & Narrative Clarity

Software Knowledge

R, Python, SQL, Excel, Power BI, PowerPoint, Bloomberg, FactSet, BlueMatrix, Google Suite, HTML, CSS, Salesforce, Power M, DAX, Adobe Illustrator/Photoshop

Work Experience

Stifel Financial Corp

Associate Vice President - Equity Research - Derivatives and Macro Strategy

New York, NY

June 2021 - Present

- *Derivatives Research & Product Innovation:* Spearhead the development of proprietary tools and workflows that integrate fundamental and quantitative research to publish high-impact, actionable trading strategies across single stocks and ETFs.
- *Data Science & Analytical Infrastructure:* Architect and maintain a custom research stack combining CBOE, Bloomberg, and other market APIs. Developed and maintained hundreds of R, SQL, and Python scripts to automate reporting, surface insights, and power internal dashboards.
- *Portfolio Strategy & Risk Management:* Advise private clients on \$100M+ in overwrite portfolios by designing real-time alert systems and risk-optimized trade selection models with a return of ~9.5% while minimizing downside risk.
- *Strategic Operations & Research Management:* Partner with Directors of Research to deliver firmwide strategic reviews, performance analytics, and executive-ready presentations supporting senior decision-making and client engagement.
- *Cross-Functional Trading Desk Enablement:* Build bespoke dashboards and models for the options trading desk to support custom client requests and enable more scalable product delivery.
- *Leadership & Talent Development:* Co-founded the Associate Development Committee to lead firmwide initiatives focused on peer training, knowledge sharing, and professional development—creating a sustainable culture of excellence across research teams.

Stifel Financial Corp

Associate Analyst - Equity Research - Energy Infrastructure & MLPs

St. Louis, MO

July 2018 - June 2021

- Developed and maintained detailed financial models of ~30 companies using rigorous company modeling, accounting, and fundamental analysis to forecast earnings, assign target prices, and generate actionable trade recommendations.
- Authored and published over 300 equity research notes in 2020, effectively communicating complex market insights and trends.
- Engineered custom R-based dashboards and automation tools to aggregate model data from diverse sources, enhancing forecasting accuracy and significantly reducing reporting and analysis turnaround times.
- Assisted in expanding coverage to the natural gas utility sector, contributing to strategic growth initiatives.

Education

The University of Tennessee-Knoxville - B.A. – Economics – 2016

CFA Level I December 2019 – Pass

Previous Experience

GadellNet Consulting Services - Business Analyst – 2017-2018

LockerDome Inc. – Business Analyst - 2017

Interests and Other

Former Semi-Pro box lacrosse, college soccer/ lacrosse, Restaurant FOH, College, Newspaper writing & photography, Fantasy and Si-Fi Books