

Luke Newman-Silva

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EDUCATION

The Pennsylvania State University | Smeal College of Business

Bachelor of Science in Finance

Minor in International Business | Real Estate Analysis and Development Certificate

University Park, PA

Expected May 2027

Cumulative GPA: 3.60/4.00

PROFESSIONAL EXPERIENCE

Morgan Stanley

Wealth Management Intern

Menlo Park, CA

June 2026 – August 2026

- Conducted 60+ plan reviews across multiple recordkeepers and participated in client meetings for the Traum Vaughan team, a \$3B AUM practice serving high-net-worth Silicon Valley clients and corporate 401(k) plans
- Built 15+ fund swap proposals, several of which were adopted into the team's model portfolios; modeled 10 401(k)-to-IRA rollover portfolios and created Goal Planning System (GPS) models for retirement and investment plans
- Developed an AI agent that extracted and validated recordkeeper report data, cutting quarterly 401(k) plan review prep time by 70% across nearly all plan clients; also built agents for lead qualification and for turning meeting notes into GPS-ready inputs
- Produced investment vehicle analyses and client education materials for advisor-led planning conversations, using Fi360, Envestnet, and Morningstar for fund mapping and plan-level reporting

Alpha Management (Pi Kappa Phi chapter house)

House Manager

State College, PA

August 2024 – May 2025

- Managed a \$25K+ annual property budget and vendor contracts for a 30+ resident house, ensuring lease compliance, resolving tenant issues, and coordinating repairs to protect long-term asset value
- Partnered with the management company and chapter leadership on contract enforcement and safety inspections

ETHIX Construction

Founder & Project Manager

San Francisco, CA

July 2020 – June 2023

- Founded and managed a three-person residential construction business, overseeing client acquisition, project execution, budgeting, and operations across \$80K+ in revenue
- Grew the client base through referrals, Nextdoor, and local marketing, with 45% of revenue from repeat or referred clients

Bay Flips

Founder

San Francisco, CA

July 2021 – June 2022

- Bought and sold 20+ cars, generating \$300K+ in revenue at a 21% profit margin through disciplined sourcing and pricing

PROJECTS

Daylign | daylign.lknsventures.com

Founder & Developer

San Francisco, CA

January 2026 – Present

- Led product strategy, subscription pricing, and monetization for a freemium iOS app, overseeing development, market positioning, and launch planning.
- Built and shipped a full-stack iOS productivity app (React, TypeScript, Supabase, Capacitor) with secure sign-in, offline sync, push notifications, and managed App Store compliance and privacy requirements

INVOLVEMENT

Nittany Markets Analysis Association (NMAA)

Member

University Park, PA

September 2024 – April 2026

- Conducted comparative investment research on emerging market funds, evaluating expense ratios, historical performance, portfolio composition, and suitability against iShares EMFG

Penn State Realty Association (PSRA)

Member

University Park, PA

November 2024 – May 2026

- Underwrote a local redevelopment case, applying NOI, cap rate, and return analysis to assess deal viability

SKILLS, HONORS, CERTIFICATES

Skills: Spanish (Native) • Investment Analysis • Portfolio Construction • Excel • SQL • Fi360 • Envestnet • Morningstar

Honors: Engineering Entrepreneurship Best Business Award & Grant, November 2025 • Dean's List, Spring 2024 – Spring 2026

Certificates: FINRA Securities Industry Essentials (SIE), June 2026 • Bloomberg Market Concepts (BMC), August 2025

Interests: Former varsity lacrosse and water polo captain • Dirt biking and rebuilding motorcycles • Backcountry snowboarding