



HIGHTOWER
The Otto Group

Bloomberg certification at USF helps students excel in financial careers

Featuring

Michael Wood, Investment Operations Analyst

The Otto Group

Sarasota, Florida

July 2021



University of South Florida spring 2021 graduate [Michael Wood](#) is learning the benefits of Bloomberg certification thanks to a program at the USF Sarasota-Manatee campus that provides a deep dive into financial markets through the [Bloomberg Market Concepts](#) (BMC) program.

The BMC program is a 10-hour, self-paced e-learning course that consists of five modules – Getting Started, Economics, Currencies, Fixed Income and Equities – woven together with Bloomberg data, news and analysis.

BMC learners also gain access to [Bloomberg Professional Services](#), which provides real-time data from markets around the world, in addition to news, research and powerful analytics used by top decision-makers in finance, business and government.

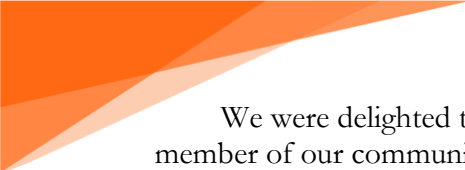
Working part-time at The Otto Group at Hightower Advisors in Sarasota, Wood was on the verge of graduating with a degree in finance and thought he might have missed the opportunity to gain Bloomberg certification prior to completing his coursework.

When Clara Reynardus de Villanueva, director of development on the Sarasota-Manatee campus, learned of Wood's desire to complete the Bloomberg course, she worked with staff in the Muma College of Business, including Campus Dean Jean Kabongo and Finance Instructor Eddie Sanchez, director of the David Kotok and Cumberland Advisors Bloomberg Lab at the Sarasota-Manatee campus, to help Wood get into the course and complete the program before graduation.

"After I completed the course, I found it was very useful and I am grateful I was able to sign up and gain my certification," Wood said. "Going into the financial services industry, I quickly realized the importance of Bloomberg certification. Being an analyst, I conduct a lot of research and Bloomberg helps me to understand the details of investment options, markets and currencies and how to apply that information to the benefit of our clients."

Wood works as an investment operations analyst for financial advisory firm The Otto Group at Hightower Advisors in Sarasota, a position he began as he neared completion of his finance degree. Currently, he partners with the team's advisors in both review and monitoring of assets in client portfolios.

The Otto Group provides customized investment, financial and advanced planning services to individuals, businesses, foundations and families. After 20 years of working with traditional



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financial institutions, [Matt Otto](#), partner and managing director of The Otto Group, joined Hightower Advisors LLC, seeking an opportunity to provide a personalized suite of sophisticated and comprehensive wealth management strategies and solutions. Otto recently celebrated five years with Hightower, a Chicago-based registered investment advisor with more than \$93 billion in client assets under management.

"From day one, Michael has been a huge asset to the team here at The Otto Group. His analyses help the firm make sound decisions to benefit each of our clients," Otto said. "When hiring for this position we had applicants from all over the U.S. and abroad. We were delighted to find Michael, a member of our community, who attended USF and has decided to live work and live locally. Michael's USF education gave him the foundational financial and asset management skills that we were seeking, which enhances our overall client service experience."

"Our mission-driven practice guides our clients toward achieving financial wellness through our Financial Wellness Formula and 10-point Advanced Planning services," Otto added.

"Understanding all aspects of a client's personal, business and financial life allows our team to deliver investment and lifecycle solutions tailored to their own needs and goals, in addition to the those of their future generations. Our mantra is meaningful work with meaningful people, which describes our clients, centers of influence, and team members completely. We are happy to be a supporter of USF and its students."

Wood attended classes at the USF campus in Tampa after growing up in Manatee's Cortez neighborhood, where his father works as a commercial fisherman.

The Bloomberg Lab opened on the Sarasota-Manatee campus in March 2017 after a donation from Cumberland Advisors and Chairman David R. Kotok to educate students about [Bloomberg financial software](#), which is used by more than 325,000 professionals globally for up-to-the-minute financial and economic data.

"The reason Bloomberg is important as an educational tool is because it provides more than just theory from a textbook," Sanchez said. "It puts into practice the theoretical and provides a measure of functionality and understanding of financial markets at a practical level, and you can pull all of that information together in real time. Bloomberg is the gold standard of financial analysis."

Sanchez has personal experience with Bloomberg systems. He worked for more than 20 years as a hedge fund portfolio manager and securities analyst before he earned his doctorate in business

administration with a concentration in finance.

The Bloomberg Lab is equipped with 12 terminals and is open to students across USF. In addition, students can take Bloomberg course modules remotely online to gain their certification. During the past two years, more than 200 students have achieved Bloomberg certification at the USF Sarasota-Manatee campus.

For more information about the Bloomberg Market Concepts program, visit [here](#).

[Click here](#) to view the article on the *USF Campus Insider*, July 2021

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About the Otto Group at Hightower Advisors

The Otto Group is a wealth management advisory practice founded by Matthew J. Otto. With locations in Sarasota, Florida and Vail, Colorado, the practice provides holistic wealth management solutions to a select group of families, individuals, and business owners. The team has an average of 15 years of industry experience and prides itself on its wealth management formula that blends investment consulting, advanced planning, and relationship management. All members of The Otto Group are fiduciaries, placing the interests of their clients first. The Otto Group is supported by Hightower Advisors, LLC and Hightower Securities, LLC. Learn more about The Otto Group by visiting otto.hightoweradvisors.com.

About Hightower Advisors

Hightower is a wealth management firm that provides investment, financial and retirement planning services to individuals, foundations, and family offices, as well as 401(k) consulting and cash management services to corporations. Hightower's capital solutions, operational support services, size and scale empower its vibrant community of independent-minded wealth advisors to grow their businesses and help their clients achieve their vision of "well-th rebalanced." Based in Chicago with advisors across the U.S., the firm operates as a registered investment advisor (RIA). Learn more about Hightower's collaborative business model at www.hightoweradvisors.com.

About the University of South Florida

The University of South Florida is a high-impact global research university dedicated to student success. Over the past 10 years, no other public university in the country has risen faster in U.S. News and World Report's national university rankings than USF. Serving more than 50,000 students on campuses in Tampa, St. Petersburg and Sarasota-Manatee, USF is designated as a Preeminent State Research University by the Florida Board of Governors, placing it in the most elite category among the state's 12 public universities. USF has earned widespread [national recognition](#) for its success graduating under-represented minority and limited-income students at rates equal to or higher than white and higher income students. USF is a member of the American Athletic Conference. Learn more at www.usf.edu.

Disclosures and Citations

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