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Rising Star: Matthew Bradley, the number guy

By Jill Phillips
jill.phillips@indystar.com

Matthew Bradley loves numbers. In high school, he dreamed of working on Wall Street.

After working briefly in public accounting at Coopers & Lybrand (now PricewaterhouseCoopers), he pursued



an MBA in finance from Indiana University. In 1997, he joined Peloton Wealth Strategists, where he now serves as chief investment officer and a principal.

Early in his career at Peloton, Bradley took on extra responsibilities in an effort to build up to co-owning the company.

Watching his father build a successful retail optical business in Fort Wayne helped fuel Bradley's entrepreneurial spirit.

Bradley enjoys the many hats business owners wear.

"You have the professional side where you are working with clients and developing strategies, at the same time you are managing your own profit, employees and people," he said.

Matthew Bradley

- » **Age:** 38.
 - » **Home:** Fort Wayne, now lives in Fishers.
 - » **Occupation:** Chief investment officer, chairman of the investment committee and principal at Peloton Wealth Strategists.
 - » **Education:** Bachelor's degree in accounting and MBA from Indiana University.
 - » **Family:** He and his wife, Danica Vasilchek, have four children.
 - » **Hobbies:** Golf, cycling, cooking and gardening.
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How did you manage to stand out in a crowd and advance quickly in your career?

I joined the firm at 25, right after business school. Right away I knew it was exactly what I wanted to do. I tried to treat the company like an owner would. I tried to improve all the time. I took on responsibilities outside of my comfort zone. I think that creates a steep learning curve if you are willing to take on challenges.

What was your first entrepreneurial experience? How did it impact your future?

My dad has been an entrepreneur his whole life, so I got to see really first hand what goes into successful balancing of life and work as a business owner. It

helped me understand how rewarding it can be if you are successful at owning your own business. I've always had an entrepreneurial spirit. When I got the chance to work in that setting and build and own and manage my own firm while providing the service that's my passion — investment management.

What's the toughest mistake you ever made, and what did you learn from it?

When I first started I was focused on the analysis side of investing. When we went into what was a really painful bear market, I was still looking at stocks and markets and the numbers. I didn't pay enough attention to the emotional side of it from a client perspective. After experiencing many market environments, I learned it's not about having the analysis correct, but the strategy for each client and being able to communicate it.

How important is it to have a mentor? Did anyone in particular help you advance in your career?

I think it can be extremely helpful. You can learn a lot from successful investment management is the accumulation of experiences.

Jim Elliott was a great mentor. He mentored me from the day I started working with him. I was extremely fortunate to learn the investment business from someone with his ethics and a great financial mind. Jim always said portfolio management is part art and part science – meaning there's a subjective component to doing it well. The financial and analytical tools are important but they can only do so much. They can't make investment decisions for you. You still have to trust your experience and judgment and take a position, a stand.

What advice would you give to other young people trying to get started in the investment industry?

If you know that this is exactly what you want to do, get as much practical experience as you can.

About Peloton Wealth Strategists

Founded in 1984, Peloton Wealth Strategists is an independent, fee-only Registered Investment Advisor with a rich tradition of highly individualized plans and personal service. We serve clients throughout the United States and internationally, with independence, ethics and fundamental securities analysis at the heart of everything we do. Throughout Peloton's history we have developed a process-oriented approach that balances the art and science of portfolio management. Peloton is not affiliated with a brokerage, insurance company or other securities firm, and our fully integrated approach to investment management provides the right structure for every client. For more information, go to pelotonwealth.com.