DARRYL JONES

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INVESTMENT BANKER

More than 7 years of investment management experience with award-winning results.

Well-developed relationship management expertise that complements account acquisition skills.

Broad knowledge of numerous financial instruments and complex investment scenarios.

— AREAS OF KEY EMPHASIS —

- Portfolio Management
- Mutual & Hedge Funds
- Client Relations
- Private & Institution Accounts
- High-Impact Presentations
- Team Leadership
- Negotiation & Closing
- Regulatory Compliance
- Exceeding Revenue Goals

SIGNATURE ACHIEVEMENTS

Shattered performance expectations, including adding $12.7M in assets in one year.

Attained national renown for outstanding performance on highly traded mutual funds.

Recognized among the top 200 advisors worldwide.

PROFESSIONAL EXPERIENCE

Investment Officer | Heritage Trust, Chicago, Illinois 11/2010 – Present

Lead team in investment product sales; oversee relationship-banking team with a tireless focus on increasing revenue and maximizing profitability. Consult with clients to assess financial situations and goals; develop targeted investment strategies.

Key Accomplishments:

- Consistently **maintained 100% or better** of established production goals.
- **Successfully attained 127% of 2011's $10M objective** through outstanding relationship management.
- **Earned multiple national awards** for outstanding acumen and above-the-bar production with Kieheen Capital and Persephone mutual funds in 2013 and 2014.
- **Received Alliance Capital Advisory Award** for ranking among the top 200 advisers worldwide for new business development.

Investment Associate | Edward Jones, Portland, Oregon 7/2008 – 11/2010

Assisted Outside Sales Representatives throughout the investment sales process. Coordinated transactions with top brokerage houses.

Key Accomplishments:

- **Supported continual revenue growth** by planning and executing client-focused sales events.
- Assisted sales team with securing and growing major institutional account that **added millions of dollars** to total assets under management.

EDUCATION AND CREDENTIALS

Bachelor of Business Administration (MBA) – 2008 | OREGON STATE UNIVERSITY, Portland, Oregon

Professional Licenses: FINRA Series 7, 6, 63, & 65