

JEFFREY G. SHEPARD, CFA, CFP

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EXECUTIVE SUMMARY

Full stack web developer looking to integrate with an existing development team. I work well independently and also have experience and sound judgement for using team resources effectively to complete projects and tasks. Primary focus is add value to development team while improving my skills and experience in order to enhance my personal full stack development.

PROFESSIONAL EXPERIENCE

FOODBOSS INC, Chicago, IL

2020-Present

Junior Web Developer

- Full stack web developer with emphasis on front end
- Building front end components and styling using React
- Built administrative dashboards using Retool
- Backend development using PostgreSQL and Knex
- Fully integrated into development team using Agile methodology

EASTGATE CAPITAL ADVISORS LLC , Winnetka, IL

Senior Advisor

2021-Present

Managing Director

2017-2020

- Financial Planning for individuals and families
- Defined Contribution and Defined Benefit plan development and management for business.

WILLIAM BLAIR & CO., Chicago, IL

2012-2016

Sales Associate / Institutional Bond Sales

- Partnered with Bond Salesman to increase bond sales to institutions, resulting in total annual sales of \$600 million in corporate and tax-exempt bonds
- Developed sales tools to evaluate account portfolios for more targeted sales
- Reviewed and analyzing bond pricing to accurately reflect the value of portfolios

- Conducted analysis to identify deteriorating credits and present recommendations for sale or purchases
- Identify and recommend bond swaps to improve account investment performance

LA SALLE JACKSON PARTNERS LLC

2009-2012

FIXED INCOME ASSOCIATES LLC, Chicago, IL

2011-Present

Partner (Managing Real Estate Broker License)

- Established two real estate development companies, which focused on residential properties (three flat residences)
- Purchased 9 condos and rehabbed properties for future resale or rental
- Performed analysis on geographic location, returns, type of property and utilized MLS to compare values

DIRECT FOREX, LTD., Chicago, IL

2007-2008

Partner

- Managed institutional and individual client relationship to retain clients and grow book of business
- Reviewed and evaluated accounts to avoid penalties from NFA
- Established legal structure, contractual relationships with dealer/brokers, staffed accounting and finance personnel for smooth business operation and develop business strategies

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- Served as Consultant to firm's largest client in fall of 2008 in Dubai
- Developed risk management parameters and trading platform optimization, which improved business profitability

SEGALL, BRYANT, & HAMILL, Chicago, IL

2005-2008

Portfolio Manager

- Served as portfolio manager for insurance company and high net worth fixed income portfolios, which increased book of business
- Achieved Investment performance to exceed investment benchmarks for all portfolios and clients retained by firm

COLUMBIA MANAGEMENT GROUP / STEIN, ROE & FARNHAM

1994-2005

Chicago, IL

Senior Vice President / Director of Insurance Asset Management Group, 1994-2005

Vice President, Prior to 1994

- Supervised the retention and growth of \$4.4 Billion of insurance company assets managed by Columbia Management Group
- Managed staff of four, which improved efficiency and productivity
- Acted as Portfolio and Relationship Manager for \$1.7 Billion of taxable and tax-exempt fixed income assets, which increased in value
- Produced excellent investment returns, resulting in investment performance exceeding benchmarks by 26 basis points annually for previous five years
- Managed client relationships, resulting in strong client retention with zero clients resignations over seven year period ending in 2004
- Served as Leader in establishing investment management strategy for the firm as Chairman of Municipal Institutional Strategy Team and Crossover Strategy Team to develop management of tax-advantaged securities for institutions
- Selected as member of Stein Roe Taxable Strategy Team that determined fixed income strategy for taxable investments of institutional clients.

Education

UNIVERSITY of CHICAGO, Masters (Artium Magister), in Economics

NORTHWESTERN UNIVERSITY, Bachelor of Arts in Economics