

JOSE ANTONIO CAMPOS

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QUALIFICATIONS SUMMARY

Detail-oriented and skilled **Financial Researcher / Business Analyst** with solid experience serving multinational organizations in the financial services and exporting industries.

Excellent interpersonal skills; able to foster close working relationships with diverse teams of professionals and management; build trust with clients and operational support. Able to work in fast paced demanding environment while delivering a high standard of service. Strong project management aptitudes; capable of leading and directing teams to complete projects. Extensive exposure to cross-cultural practices and international business protocols, fluent in English and Spanish.

PROFESSIONAL EXPERIENCE

Citibank N.A., Tampa, FL

August 2008 – October 2013 &

Corporate Actions Investigations Analyst,

January 2015 – August 2016

Handled and answered high volume incoming inquiries for accounts held in direct custody for a customer base of institutional clients in the U.S., Europe, Asia and Latin America.

- Recognized as Subject Matter Expert (SME) with exceptional ability to document processes, eliminate duplication of services, and facilitate operational standardization. Strong understanding of SWIFT. Expertise in rescuing at-risk accounts.
- Analyzed, researched and replied to client inquiries pertaining to voluntary and mandatory corporate for both income and corporate actions events from Latin American markets (Equities & Fixed Income). Handled inquiries confirming entitlement and payment confirmation on voluntary time-sensitive events.
- Liaised with the multiple teams, internal, external, management and product management to resolve complex issues including IT, reconciliation, timeliness, calculation and taxation on voluntary and mandatory events to ensure accurate inquiry responses.
- Prepared presentations and metrics for key clients' monthly calls. Maintained and managed an issues list vetted with multi teams including management, IT and Product. Led Asset Servicing monthly call with key clients concerning issues outstanding from Asset Servicing including IT enhancements and other deliverables resulting in a significant documented improvement in client satisfaction. These initiatives improved satisfaction by around 40% in client surveys scores on relevant account coverage.

J.P. Morgan, Tampa, FL

Client Service Delivery Representative,

October 2013 – January 2015

Handled and answered high volume of cash related inquiries for accounts held in financial custody for a third party Investment Manager base of clients in the U.S., Europe as well as Latin America.

- Analyzed, researched and replied to client inquiries relating to cash management considering the entire custody product (FX, Asset Services, Settlements, Collateral, Sec Lending, and others) on domestic and foreign custody issues. Monitored client accounts for the correct payment and overall soundness (risk management) from a cash perspective in an integrated custody environment. Ensured that the responses follow standards of quality as well as timeliness for portfolio of accounts under coverage.
- Engaged in projects undertaken by the department to streamline the efficiency of operation to reduce manual processing. All initiatives resulted in increased client satisfaction as shown in positive feedback by the client and management as well as streamlining and the reduction of manual work.
- Trained and utilized current banking regulations and procedures including: Dodd Frank, ERISA, KYC and OFAC Screening.

RAYMOND JAMES & ASSOCIATES, St. Petersburg, FL

Junior Research Associate,

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Coordinated the generation and maintenance of financial valuation models including modeling of income statements, balance sheets and drivers metrics. Analyzed quarterly reports on sales trends and market valuations and presented findings in research reports and notes to investors and clients. Utilized full range of Wall Street software standards, such as Reuters, Factset, Essbase, Bloomberg and others.

EDUCATION

Bachelor of Arts; major in Economics and Minors in Finance & International Business

May 2006

ECKERD COLLEGE, St. Petersburg, FL

- *Member of the Honors Program; received a full academic Presidential Scholarship.,*
- *Finished a study abroad semester in business and cultural topics in China, Japan, Taiwan and Hong Kong.*