

JERRY JONES

High achieving and analytical investment banker with seven years of experience in the banking industry. Proven ability to work alongside a wide variety of clients to provide useful investment insights and outline any potential risks. Possesses a bachelor's degree in finance from California State University and a master's degree from Claremont Mckenna College. Excellent communication skills, in-depth knowledge of the current trends in the investment banking industry, and success-orientated attitude.

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PROFESSIONAL EXPERIENCE

INVESTMENT BANKER

1st Capital Bank, Los Angeles, CA
June 2017- March 2021

- Oversaw and managed the relation ship-ban king team, which resulted in a 15% increase in revenue and increased profitability
- Prepared and organized the execution of equity transactions
- Successfully achieved the 2020 target of \$15M
- Participated in industry conferences and panel discussions

INVESTMENT ASSOCIATE

American First National Bank, Los Angeles, CA
November 2014 - June 2017

- Helped to increase the yearly revenue by 6% via regular client-orientated sales events
- Performed company equity research
- Contributed to the preparation of fact-based growth opportunity reports

EDUCATION

Master of Finance

CLAREMONT MCKENNA COLLEGE,
Claremont, CA
September 2012 - July 2013

Bachelor of Science in Finance

CALIFORNIA STATE UNIVERSITY,
Northridge, CA
September 2009 - July 2012

KEY SKILLS

- Tax audits
- Risk management and compliance
- Wealth management
- Knowledge of commercial and private banking
- Team leadership
- Exceptional communication skills
- Impressive ability to build and maintain working relationships

CERTIFICATIONS

- ◆ CFA Institute certified Chartered Financial Analyst (CFA), August 2013