

JAMES A. CONE

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EDUCATION

University of North Carolina, Chapel Hill, NC

Graduated May 2019

Kenan-Flagler Business School

- *Major:* Business Administration; *Minor:* Environmental Science
- *Cumulative GPA:* 3.75
- *Relevant Coursework:* Financial Accounting and Analysis, Operations Management, Corporate Finance, Advanced Spreadsheet Modeling, Statistics and Econometrics, Microeconomics, Macroeconomics

PROFESSIONAL EXPERIENCE

PPD, Wilmington, NC

August 2019-June 2022

Senior Commercial Analyst

- Led the budgeting process for clinical trials from initial RFP receipt to contract
 - Worked on over one hundred unique proposals with values up to \$90MM in total costs
- Utilized PPD's proprietary budgeting system, Synergy, to create accurate budgets based on specifications provided by the client and internal PPD team
 - Operated in Excel frequently to provide clients with concise budget documents
- Tracked study spending and provided clients with cost projections based on previous work completed
 - Collaborated with Project Managers to align our budget with actual costs incurred during the study
- Mentored two different new hires; walked them through the entire budgeting process, and provided them with guidance during their first few months
 - Assisted in new hire training and taught classes on the contracting process from start-up agreements to full work orders

J.P. Morgan Private Bank, Naples, FL

June 2018-August 2018

Wealth Management Summer Analyst

- Conducted portfolio analyses across client base utilizing Workstation and Connect in order to track portfolio performance over one-month, three-month, year-to-date, and since inception time periods
 - Worked with portfolios that ranged in size from \$2MM-\$100MM
- Prepared pitch books for client presentations varying from individual family offices to non-profit organizations
 - Utilized PowerPoint, Connect, and Adobe Acrobat to create and edit slides
- Conducted due diligence on potential clients and prospects across SW Florida
 - Researched income data through Wealth Engine and gathered housing information on Zillow and the Collier County Appraiser website
- Analyzed clients' balance sheets and made recommendations on companies to hold and sell by gathering information from J.P. Morgan Markets and Bloomberg
 - Collected data on valuations and target prices for S&P 500 companies

Karlson Communications Company, Wilmington, NC

June 2017-August 2017

Employee

- Installed Cat 5 and Cat 6 cables in offices around the state and was responsible for wiring nCino's new office space
- Communicated with other job site crews to ensure completion of the project within our projected timeframe

Alternative Dispute Resolutions of the Carolinas, Wilmington, NC

June 2016-August 2016

Intern

- Analyzed worker's compensation cases from a neutral standpoint with settlements ranging from \$10,000-\$200,000
 - Discussed a broad range of cases with several plaintiff and defense lawyers across Eastern NC

SKILLS & INTERESTS

Skills: Microsoft Office, STATA, Bloomberg Certified

Interests: Fishing/Fly Fishing, Surfing, UNC Basketball, Golf, Meteorology