

Jodon B. Montgomery

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QUALIFICATIONS SUMMARY

- Bachelor of Arts in Business Administration with majors in Finance and Management, complemented by a 3.80 GPA.
- Adept at utilizing advanced coding, statistics, and financial theories to build Python financial models, displayed through innovative web applications.
- Over 6 years of leadership experience in the military and retail store management.

EDUCATION

Washington State University

Bachelor of Arts in Business Administration

Pullman, WA

May 2024

- **Majors:** Finance, Management
- **Cumulative GPA:** 3.80
- **Relevant Coursework:** Financial Accounting, Financial Institutions and Intermediation, Investment Analysis, Financial Modeling, Entrepreneurial Management, Negotiation.

Olympic College

Associate in Business

Bremerton, WA

December 2021

FINANCE EXPERIENCE

Green Rock Asset Management

Relationship Manager

Seattle, WA

September 2023 – Present

- Collaborated with the portfolio manager to maintain client relationships, overseeing a diverse portfolio of 50 clients with combined assets of over \$10 million.
- Reviewed and analyzed portfolio allocations and practiced constructing high-yield portfolios.

Python Modeling

- Experience building Python models to solve financial problems. Utilizing advanced coding, statistics, and financial theories.
- Developed web applications to visualize financial models. Including a model that allows users to easily compare company beta and returns: jodon-compare-company-returns.streamlit.app
- All models can be found on GitHub: github.com/jodonm
- Extensive experience with Excel, including the use of macros, advanced VBA code, and integrating Python with Excel.

Equity Research

- Published research article on Seeking Alpha which involved in-depth fundamental analysis and stock valuation. seekingalpha.com/author/jodon-montgomery
- Represented Washington State University at the Quinnipiac Global Asset Management Forum.

Credentials

- CFA I Candidate. Registered for the May 2024 exam.
- Certified Futures and Options Analyst (CFOA).
- Certified in Power BI through WSU's Professional and Corporate Education program.

MANAGEMENT EXPERIENCE

U.S. Army Reserves

Supervisor, Sergeant E-5

Fairchild AFB, WA

May 2018 – Present

- Directed a high-performing team of 10-15 soldiers maintaining equipment with a total book value exceeding \$50 million.
- Demonstrated effective leadership by leading teams of over 100 soldiers.
- Led my platoon to earn the Distinguished Honor Platoon title.

Business & Accounting Club**Bremerton, WA***President**2020 – 2021*

- Elected to serve as President of the Olympic College Business Club.
- Initiated and coordinated noteworthy events, such as a Q&A with our congressman and strategic partnerships with the Small Business Administration.
- Led to involvement in various other committees, including those focused on the college budget and student government budget.

Mercer Island Family Eye Care**Mercer Island, WA***Optician and Lab Manager**April 2019 – March 2020*

- Guided customers in selecting eyewear, understanding prescriptions, and navigating insurance details.
- Regularly made high-end glasses sales with values as high as \$4000 a sale.
- Pioneered the company's in-house finishing lab, reducing production costs by as much as 80%.

Pro-Optix LLC**Silverdale, WA***General Manager**March 2017 – April 2019*

- Began as an Optician and was later selected as General Manager.
- Managed daily operations, procured inventory, recruited staff, and implemented marketing strategies.

ADDITIONAL

- Participated in the Boeing Mentorship program that included biweekly meetings with a Boeing finance manager.
- Enjoy trading derivatives, employing successful option-selling strategies to generate additional income.
- Passionate about exploring the world, having studied abroad in Greece and visited 13 countries over the past 3 years.
- Enthusiastic fan of pickleball, participating in intramural games at WSU with my wife, even if we tend to lose.