

Jodon B. Montgomery

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QUALIFICATIONS SUMMARY

- Experienced in financial analysis and credit review with proficiency in analyzing financial statements and tax returns
- Adept at utilizing advanced coding, statistics, and financial theories to build Python and Excel financial models.
- Demonstrated expertise in customer service and sales, with attention to detail, effective time management, and ability to work under pressure in a fast-paced environment.

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

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 \$3000 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.