**Aristides (Tito) Orozco**

**Concord, CA 94518**

**925.351.7203**

[**atitoorozco@yahoo.com**](mailto:atitoorozco@yahoo.com)

**FINANCIAL ADVISOR**

Institutional fixed income professional with exceptional business acumen and over 20 years' experience in Institutional Fixed Income Sales. Experience with major investment banks and extensive knowledge of various fixed income securities including credit, rates, and securitized products. Successfully managing long term client relationship with pension funds, insurance companies, mutual funds, investment managers and hedge funds.

**CORE PROFICIENCIES**

Bloomberg Systems | MS Office (Excel, Outlook, Word, PowerPoint)| Salesforce: Client Relationship Management (CRM) |

Bilingual fluency in English and Spanish | Reuters

**CAREER HIGHLIGHTS**

* Experience marketing and selling structured financial products to institutional clientele, including portfolio managers, hedge funds, pension funds, and insurance companies.
* Background working with major investment banks, both domestically and internationally.
* Track record successfully managing multibillion-dollar accounts.
* Adept at developing new business opportunities, as well as managing and growing existing accounts.
* Possess exceptional network of industry contacts.
* Deft business acumen, with ability to identify opportunities and spot emerging trends.
* Outstanding communicator with experience giving presentations and speaking in public.
* Demonstrated background thriving in fast-paced, deadline-oriented environments.

**PROFESSIONAL EXPERIENCE**

**JP MORGAN CHASE**

**2017 to 2019**

**Private Client Banker**

* Actively manage banking relationships through an advice based approach, ensuring each client receives the best products and services for their needs. Partner with specialist partners to cross sell banking products to the client.

**MULTI-BANK SECURITIES, INC.**

**2016 to 2017**

**Vice President Fixed Income Sales**

* Generalist sales – enhanced the firm’s investment and high yield corporate bond, callable agency business as well as continued sales in money markets, munis, ABS, CMBS and mortgage products.

**BROWNSTONE INVESTMENT GROUP, LLC**

**2013 to 2015**

**Director Fixed Income Sales**

* Expanded the firm’s growth in money market corporate, munis, taxable munis and investment grade and high yield corporate bonds.

**CASTLEOAK SECURITIES L.P.**

**2013 to 2013**

**Director Fixed Income Sales**

* Sold Investment grade and high yield corporate bonds, agencies and MBS products to Banks, Trust Departments, Private Client Groups, Money Managers and Broker Dealers. Created swap ideas for accounts in all products.

**WUNDERLICH SECURITIES**

**2011 to 2013**

**Vice President Fixed Income Sales**

* Generalist sales – enhanced the firm’s corporate bond and callable agency business as well as continued sales in money markets, ABS, CMBS and mortgage products.

**WEDBUSH SECURITIES**

**2009 to 2011**

**Vice President Fixed Income Sales**

* Penetrated new markets for Wedbush Securities in the investment grade and high yield fixed income bond market and expanded their coverage with tier one and tier two accounts.

ADDITIONAL EXPERIENCE:

* **Financial Advisor | Ameriprise Financial, 2008 to 2008**; *Analyzed client’s current financial situation and developed a comprehensive financial plan. Recommended investment and insurance products that fit their financial goals.*
* **Vice President Fixed Income Sales| Seattle-Northwest Securities, 2006 – 2007**; *Developed and managed large corporate accounts, including Wells Fargo, Mellon Bank, City National Bank and 1st Republic Bank. Researched, analyzed and recommended interest rate products to meet the clients rate of return target.*
* **San Francisco Sales Manager, VP | ICAP Corporates, 2005 – 2006**; *Recruited to establish and manage the corporate sales effort in San Francisco. Due to loss of senior management sponsorship, this growth effort was aborted.*
* **Vice President Fixed Income Sales | Advest, 2001 – 2005**; *Sold Investment grade and high yield corporate bonds, agencies and MBS products to Banks, Trust Departments, Private Client Groups, Money Managers and Broker Dealers. Created swap ideas for accounts in all products.*
* **Vice President Fixed Income Sales | Spear Leeds and Kellogg, 1994 – 2004**; *Sold treasuries, agencies, mortgage-backed securities and repos to tier one and tier two accounts. Executed the first corporate trade in the San Francisco office when the corporate trading desk was created.*

**EDUCATION & CREDENTIALS**

**LICENSES:** SERIES 7, SERIES 63, SERIES 66

**CALIFORNIA INSURANCE AGENT** – VARIABLE CONTRACTS – LICENSE NUMBER #0G21129

NMLS ID: 1612178

**FINANCE** – SAN FRANCISCO STATE UNIVERSITY – *215 credit hours completed*