

Jonny Leaton

Financial Consultant, Wells Fargo

Summary

I graduated from the University of Virginia's McIntire School of Commerce in May 2013 with a Bachelor of Science in Commerce. My concentrations were in Finance and Information Technology, with an academic track completed in Business Analytics. I also completed a second major in Political Science. After graduating, I joined Wells Fargo's Wealth, Brokerage, and Retirement Analyst development program, where I performed Fed stress testing and FP&A modeling on over \$400B of assets for the world's most valuable bank.

Experience

Financial Consultant at Wells Fargo Advisors

May 2015 - Present (1 year 3 months)

Prepared and managed the firm's monthly income statement and forecasting across ~\$1B of revenue and provided variance analysis of actuals vs. forecast. Monthly processes include revenue modeling, accruals, allocations, data-warehousing, commissions, metrics, and headcount. Built and ran database using Salesforce inputs to track advisor-level performance on \$40B of assets. Analyzed 5 years of historical general ledger data and built model to project firm's 2016 commission expense payout to advisors. Updated financial model and methodology for managed net flows forecasting for 2016 CCAR stress tests.

Investment Banking Analyst - Asset-Backed Finance & Securitization at Wells Fargo Securities

November 2014 - May 2015 (7 months)

Underwrote term and warehouse securitizations across 12 live deals, staffed on 24 deals total. Asset classes included aircraft, railcars, shipping vessels, and containers. Information included deal terms, structural features, industry analysis, modeling results, and financial statement analysis. Served as data integrity officer in validating execution of deals and partnering with Operations and Finance to bring deals onto Wells Fargo's platform through Salesforce. Created client-ready decks and pitchbooks; met with clients while conducting due diligence.

Financial Analyst - Wealth, Brokerage, and Retirement at Wells Fargo Advisors

July 2013 - November 2014 (1 year 5 months)

Conducted monthly scenario analyses, data extracts, and modeling for corporate reporting of advisory assets under management of over \$400B. Built and ran model to perform regulatory Fed stress tests on managed advisory assets; worked in cross-functional project teams on Mid-Cycle and CCAR stress tests; researched and built methodology to forecast over \$50B in net flow assets for 2.5 years. Presented corporate-wide strategic initiative surrounding the millennial advisor business model to executive committee of Wealth, Brokerage, and Retirement.

Research Assistant at University of Virginia

August 2012 - May 2013 (10 months)

Analyzed corporations' bankruptcy filings and legal documents for study around mechanics of the 363 Asset Sale process in the restructuring of corporations.

Finance Intern at Allianz Global Assistance

June 2012 - August 2012 (3 months)

Built dashboard to consolidate data into balance sheet line items, track KPIs, and compare business units.
Analyzed insurance claims data to create regression model for indication of ultimate claims expenses.

Skills & Expertise

Microsoft Excel

PowerPoint

Financial Modeling

Leadership

Forecasting

Analytics

Strategy

SQL

Valuation

Access

Social Media

Positive Psychology

Financial Reporting

Teamwork

Data Warehousing

Scenario Analysis

Mindfulness Meditation

Corporate Finance

Investments

Management

Web Design

Essbase

Marketing

Toad

HTML

JavaScript

Social Networking

Public Speaking

Business Intelligence

Financial Analysis

Tennis

Salesforce.com

Education

McIntire School of Commerce

Bachelor of Science (B.S.), Finance, Information Technology, Business Analytics, 2011 - 2013

Grade: GPA: 3.7

University of Virginia

B.S. Commerce, Government, Finance, IT, 2009 - 2013

Activities and Societies: Student Entrepreneurs for Economic Development, Phi Eta Sigma, Reformed University Fellowship, Sigma Alpha Lambda, Dean's List

Midlothian High School

Activities and Societies: Ranked top 1% in class of 367 students, President of National Spanish Honor Society, Honor Court member, Varsity Tennis Team, Marching Band Pit Percussion, Show Choir Pianist and Drummer, Percussion Ensemble Member, National Honor Society, Math Honor Society, AP Scholar with honors

Volunteer Experience

Volunteer at Hope for All Dogs

January 2016 - Present

Hope for All Dogs is an all-breed no-kill Rescue. We rescue stray and unwanted dogs from high-kill shelters before they are euthanized. We focus on special needs dogs.

Tutor and Organizer at St. Louis Public Schools

August 2013 - October 2014

As part of Wells Fargo's partnership with St. Louis Public Schools, I oversaw logistics of weekly tutoring sessions at Dunbar Elementary as the point person for 70 tutors. This included matching tutors with students, overseeing and arranging for weekly absences or unplanned events, and tracking metrics of the program to identify areas of improvement. I also participated as a reading tutor for 3 semesters for 5 students.

Volunteer Staff at TEDxCharlotte

October 2015 - Present

Team Member at Uganda Mission Team - Stony Point Presbyterian Church

June 2010 - July 2010

Traveled throughout the southern region of Uganda and taught students about malaria prevention, issues facing teens, and relationship management. Organized and distributed medical and personal supplies in a local orphanage, hospital, and several churches.

Certifications

Series 79 - Investment Banking Analyst License

Financial Industry Regulatory Authority (FINRA) February 2015

Padi Open Water Certified Diver

PADI July 2014

Honors and Awards

Excellence First Award

April 2015

Award for net flow modeling for 2015 Mid-Cycle stress tests. Excellence First recognizes team members who exceed service expectations and provide effective activity, accomplishments, and successful results.

T.O.P. (Truly Outstanding Performance) Results Award

November 2014

Award for providing outstanding service and dedication on construction of the managed advisory model used for 2014 CCAR stress test submissions to the Fed.

Google Online Marketing Challenge

September 2013

Placed 94th percentile worldwide in the Google Online Marketing Challenge, rebuilding our client's website, RaggedMountainRunning.com, from scratch, and using SEO and paid search to optimize our client's visibility. Initiated a redeemable coupon to increase in-store sales.

<http://www.raggedmountainrunning.com/>

<https://www.commerce.virginia.edu/features/bridging-analytical-divide>

Languages

English

(Native or bilingual proficiency)

Spanish

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[Contact Jonny on LinkedIn](#)