

RAYMOND ORTIZ

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An Investment Banker with five years of experience, specializing in financial analysis, client relations, economics, and commercial banking. A proven track record of developing investment strategies for high-net-worth clients and maximizing portfolio performance.

PROFESSIONAL EXPERIENCE

INVESTMENT BANKER

New England Investing Co., Boston, MA | October 2019 – Present

- Analyze client portfolios valued at \$150K-\$700K to evaluate investment opportunities, assess ROI potential, and provide recommendations to maximize portfolio performance
- Performance analysis of business financials, analyze product use cases, and evaluate market landscapes to determine long-term ROI growth for business investments, resulting in 100%-300% increase in portfolio growth for client accounts
- Attend meetings with existing clients and potential prospects to provide education on investment strategies, economics, and portfolio management

INVESTMENT BANKER

Boston Financial Consultants, Boston, MA | May 2017 – October 2019

- Analyzed investment opportunities and ROI potential for businesses within the healthcare sector, including medical suppliers and clinical laboratories
- Provided bimonthly updates to clients and marketing teams on portfolio performance, purchasing decisions, and company financials

EDUCATION

BACHELOR OF SCIENCE (B.S.) ECONOMICS

Boston College, Boston, MA | September 2013 - May 2017

KEY SKILLS

- Investment Banking
- Financial Analysis
- Economics
- Client Relations
- Portfolio Management

CERTIFICATIONS

- Series 7, FINRA, 2017
- Series 63, FINRA, 2017
- Series 65, FINRA, 2017