

# JERRY JONES

High achieving and analytical investment banker with seven years of experience in the banking industry. Proven ability to work alongside a wide variety of clients to provide useful investment insights and outline any potential risks. Possesses a bachelor's degree in finance from California State University and a master's degree from Claremont Mckenna College.

Excellent communication skills, in-depth knowledge of the current trends in the investment banking industry, and success-orientated attitude.

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## PROFESSIONAL EXPERIENCE

### INVESTMENT BANKER

1st Capital Bank, Los Angeles, CA  
June 2017 - March 2021

- Oversaw and managed the relationship-banking team, which resulted in a 15% increase in revenue and increased profitability
- Prepared and organized the execution of equity transactions
- Successfully achieved the 2020 target of \$15M
- Participated in industry conferences and panel discussions

### INVESTMENT ASSOCIATE

American First National Bank, Los Angeles, CA  
November 2014 - June 2017

- Helped to increase the yearly revenue by 6% via regular client-orientated sales events
- Performed company equity research
- Contributed to the preparation of fact-based growth opportunity reports

## EDUCATION

### Master of Finance

CLAREMONT MCKENNA COLLEGE,  
Claremont, CA  
September 2012 - July 2013

### Bachelor of Science in Finance

CALIFORNIA STATE UNIVERSITY,  
Northridge, CA  
September 2009 - July 2012

## KEY SKILLS

- Tax audits
- Risk management and compliance
- Wealth management
- Knowledge of commercial and private banking
- Team leadership
- Exceptional communication skills
- Impressive ability to build and maintain working relationships

## CERTIFICATIONS

- CFA Institute certified Chartered Financial Analyst (CFA), August 2013