

Bob Jones, CFA

bjones@notanemail.com

Street
City, State, Zip
555.555.5555

WORK EXPERIENCE

Smallfirm

Senior Analyst/Trader

City, State

Mar 2008 – Present

- Active management of a \$20 million Emerging Markets focused fund with a value driven long-short strategy
- Performed company research and due diligence to identify investment opportunities, developed valuation models using discounted cash flow modeling and comparables analysis, and presented findings to the manager
- Managed market and currency exposures of the fund using ETFs and derivative instruments, including futures and forward contracts, to hedge the exposures
- Implemented and adjusted the hedges, on a beta-weighted basis, based on the market changes to reflect appropriate exposure
- Controlled all levels of reporting and operations of the fund. Slashed operating cost by 50% by eliminating redundancies between service providers while improving level of operational performance figures
- Advised private partnership and direct investments for an asset management firm on three funds with over \$500 million under management
- Prepared scenario analysis of various exit options as the funds mature and present to client with a recommend course of action

LargeCorp

Senior Associate

City, State

Jun 2006 – Mar 2008

- Oversaw fund activities of 18 funds, with total portfolio value of over \$10 billion
- Conducted impact analysis of extraordinary events using Excel and MCH, a proprietary system developed by State Street. Presented results to account managers and clients
- Created monthly reports based on client's request and specification
- Researched security information with Bloomberg and Interactive Data and reviewed trade activities
- Redesigned method for reporting futures positions resulting in improved efficiency for the six member team

Wealth Management Firm

Intern

City, Country

Jul 2005 – Aug 2005

- Analyzed cash flow and income statements, created monthly and quarterly financial reports, and presented results to the Area Controller
- Conducted valuation analysis of assets for divestiture using Excel
- Prepared asset valuation reports for the company during the transition from Company1 to Company2

EDUCATION

Non-Ivy University – Business School

Bachelor of Science in Business Administration; dual concentration in Finance and Marketing

City, State

Class of 2006

- Graduated cum laude
- Member of Beta Alpha Psi, an honorary organization for finance and accounting students
- Graduate-level coursework in Quantitative Modeling with Excel

Non-Ivy University Study Abroad Program

Abroad Internship Program

City, Country

Jun 2005 – Aug 2005

PERSONAL

Languages: Fluent in Mandarin Chinese

Accreditations: CFA Charterholder

Computer: Proficient in Excel, PowerPoint, Bloomberg

Interests: Weight Training, Broomball, Poker, Puzzle Solving, Reading