

**Bob Jones, CFA**  
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## experience

2008 - Present

### **SMALLFIRM**

**CITY, STATE**

#### **Senior Analyst/Trader (2010 – Present), Analyst (2008-10)**

Active management of a \$20 million Latin America focused fund with a value driven long-short strategy. Performed company research and due diligence to identify investment opportunities and hedged portfolio exposures to ensure they remain within defined levels. Advised private partnership investments for an asset management firm on three funds with >\$500 million under management.

- Studied company financial statements and industry data to determine business drivers and monitored market developments for potential catalysts. Developed detailed valuation models using discounted cash flow modeling and comparables analysis. Presented findings to the manager.
- Managed market and currency risk of the fund using ETFs and derivative instruments including futures and forward contracts to hedge 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.
- Institutional advisory for private partnership investments, including valuation of the investments, development of the underlying portfolio companies, and return analysis.
- Led scenario analysis of various exit strategies proposed by partnerships as the funds mature and present to client with a recommend course of action.
- Supervise the valuation, developments and operations of 3 private equity funds (2 FoF and 1 VC fund).

2006 - 2008

### **LARGECORP**

**CITY, STATE**

#### **Senior Associate**

Oversaw fund activities of 18 funds, with total portfolio value of >\$10 billion.

- Conducted impact analysis of extraordinary events using Excel and ABC, a proprietary system developed by LargeCorp. Presented results to account managers and clients.
- Created monthly segregation and SEC yield reports based on client's request and specification.
- Researched security information with Bloomberg and Interactive Data and reviewed trade activities.
- Deconstructed derivative instruments for valuation purposes, including TIPS, I/O's, credit default swaps, mortgage backed securities, and Pay-In-Kind securities.
- Redesigned method for reporting futures positions resulting in improved efficiency for the six member team.

Summer 2005

### **WEALTH MANAGEMENT FIRM**

**CITY, COUNTRY**

#### **Intern**

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

## certifications

**CFA charterholder**

## education

2002 – 2006

### **NON-IVY UNIVSERSITY**

**CITY, STATE**

Bachelor of Science in Business Administration, dual concentration in finance and marketing. Graduated with Latin honors. Member of Beta Alpha Psi, an honorary organization for finance and accounting students. Graduate-level coursework in Quantitative Modeling.

Summer 2005

### **NON-IVY UNIVSERSITY STUDY ABROAD PROGRAM**

**CITY, COUNTRY**

#### **Abroad Internship Program**

Selected to attend a semester abroad program that combined academic coursework, with emphasis on management in business organizations from an international perspective, and a full-time internship position.

## personal

Fluent in Mandarin Chinese. Enjoys weight training, poker, and broomball. Middle and high school mathematics tutor. Avid [MLB team], [NBA team] and [NFL team] fan.