

LANDON M. JONES

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RESEARCH/FINANCIAL/INVESTMENT ANALYSIS ASSOCIATE

Recent graduate with a Bachelor's Degree in Finance and professional experience in cost and performance analysis, portfolio performance report support, and data management. Highly adept at identifying and resolving cost basis, wash sales, and share quantity discrepancies, as well as updating accounting methods. Academic background includes virtual portfolio management, financial statement analysis, stock valuations, and mock business management. Well-developed analytical, software, and financial modeling skills. Excellent problem solving and research abilities. **Core qualifications include:**

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| <input checked="" type="checkbox"/> Equity Valuation | <input checked="" type="checkbox"/> Pro Forma Creation | <input checked="" type="checkbox"/> Fixed Income Analysis | <input checked="" type="checkbox"/> Forecasting |
| <input checked="" type="checkbox"/> Risk Management | <input checked="" type="checkbox"/> Security Valuation | <input checked="" type="checkbox"/> Statistical Data Analysis | <input checked="" type="checkbox"/> Market Trend Analysis |
| <input checked="" type="checkbox"/> Financial Modeling | <input checked="" type="checkbox"/> Equity Research | <input checked="" type="checkbox"/> Financial Statement Analysis | <input checked="" type="checkbox"/> Portfolio Analysis |

EDUCATION & CREDENTIALS

Chartered Financial Analyst (CFA) Program

2019 Level II Candidate

BS in Finance, ROGERS BUSINESS SCHOOL, Dayton, OH (2018) | GPA: 3.5

- **Awards:** Earned Business & Entrepreneurship Student Excellence Award (2018) | Dean's List Student (2017, 2018)
- **Financing Business Ventures Class Project:** Developed business concept and plan, including pro forma financial statements used for valuation and financing purposes, for a startup company.
- **The Business Strategy Game:** Part of a 6-person team that managed business operations, planning, and strategy for a mock manufacturing firm for 10 weeks. Team placed second in the class for this project.

PROFESSIONAL EXPERIENCE

FREIDMAN WEALTH MANAGEMENT, Celina, OH

2017-Present

Client Data Operations Associate (Internship)

Carry out the identification and resolution of cost basis, wash sales, and share quantity discrepancies in Orion and Portfolio Center for Friedman client account reports and custodian bank reports. Update credit and debit data as needed, as well as updating of portfolio performance reports by resolving cost basis discrepancies. Create and update reporting groups, manage client data, including changes and page code audits, and assist with data adjustments and maintenance during quarterly reports. Communicate with financial advisors.

- Eliminated a backlog of 200+ unresolved issues to facilitate performance reporting.
- Dramatically reduced a backlog of work by updating and transforming accounting methods for client accounts.

ROGERS BUSINESS SCHOOL, Dayton, OH

2013-2016

Graduate Assistant, School of Business (2016)

Analyzed and entered research study survey data, provided administrative and faculty support, and assisted faculty with research projects, literature searches, and other functions. Previously held the position of **Residence Assistant** (2015-2017).

TECHNICAL SKILLS

MS Office, SPSS, IBM Watson Analytics, StockTrak, CRM, SQL, Orion, Portfolio Center

PROFESSIONAL AFFILIATIONS

Student Member, National Financial Analyst Association
Member, American Institute of Financial Associates