

NATHANIEL JACKS

nathaniel.jacks@mba10.mcombs.utexas.edu
801 W 5th St, Apt 510 - Austin, TX 78703 • (214) 676 - 2538

EDUCATION

THE UNIVERSITY OF TEXAS - Austin, Texas

Master of Business Administration, McCombs School of Business, Full-Time Program

May 2010

- Concentration in Finance; GPA 3.9; GMAT 680
- Damon P. Smith III Endowed Scholarship
- Member-Graduate Finance Association; Portfolio Manager-MBA Investment Fund, LLC

SOUTHERN METHODIST UNIVERSITY - Dallas, Texas

Bachelor of Business Administration, Cox School of Business

August 2006

- Major in Financial Consulting

Bachelor of Arts, Meadows School of the Arts

December 2003

EXPERIENCE

CIMARRON ASSET MANAGEMENT - Irving, Texas

Summer 2009

Equity Analyst

- Analyzed equity investment opportunities in multiple sectors for large-cap, small-cap, and socially responsible funds, presented recommendations to the investment committee, which resulted in portfolio changes
- Researched the Biotechnology industry, evaluated effectiveness of application of Cimarron's investment process to the industry; presented findings and recommendations to the portfolio managers
- Constructed a quantitative model for comparative analysis of the Financial Sector with a focus on Commercial Banks, model enables portfolio managers to identify and evaluate investment opportunities

MBA INVESTMENT FUND, LLC - Austin, Texas

2008 - Present

Portfolio Manager, Financial Sector

- One of eighteen students selected through a formal application and interview process to actively manage value, growth, and fixed-income portfolios with total assets under management of approximately \$11.5MM
- Delivered a comprehensive Diversified Financial Services industry report to advisor; provided analysis of macroeconomic environment, industry trends, and company-specific fundamentals; purchased investments based on findings
- Presented current industry analysis and stock-specific investment recommendations in a morning meeting format to portfolio management team; findings are used by team to support active management of the portfolio
- Executed Financial Sector teams' securities trades and acted as a liaison between the team and our prime broker

SOUTHWEST SECURITIES, Investment Management Group - Dallas, Texas

2006 - 2008

Product Specialist/Associate (August 2006- July 2008)

- Developed and launched a mutual fund wrap product: required building mutual fund screens, establishing back office procedures, and implementing a customized marketing strategy; new product raised \$30MM within 20 months
- Traded equity and fixed income securities for separately managed accounts
- Acted as primary contact with regards to advisory accounts for over 500 retail representatives; trained representatives on-site at branch offices to market financial products; resulted in an average of 5 new account openings per visit

Intern/Business Developer (February 2006 – August 2006)

- Marketed the products of SWS Financial; exceeded daily call quota by 25% generating an average of 10 leads per day

SEPTIEN ENTERTAINMENT GROUP - Dallas, Texas

2004 - 2006

Marketing Coordinator

- Created and managed a \$22K marketing plan and budget, led to approximately 20% revenue growth

ADDITIONAL

- **CFA Level II Candidate**
- NASD Licensed Series 7, 66
- Studied abroad in Italy (Summer 2003); enjoy cooking; currently training for 2010 Dallas White Rock Marathon
- **Citizenship:** United States