WILLIAM (JON) DAUGHERTY, JR.

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EDUCATION

THE UNIVERSITY OF TEXAS AT AUSTIN, McCombs School of Business, Austin, TX **May 2014**
Master of Business Administration, Full-Time Program
- McCombs Energy Finance Group, McCombs Admission Committee; GPA *3.7*

SOUTHERN METHODIST UNIVERSITY, Cox School of Business, Dallas, TX **May 2009**
Bachelor of Business Administration in Finance, with honors
- University Honors Program, BBA Honors Program, University Scholar; GPA *3.7*

THE HOTCHKISS SCHOOL, Lakeville, CT **May 2005**

EXPERIENCE

RAYMOND JAMES, ENERGY INVESTMENT BANKING, Houston, TX **June 2013 – August 2013**
Summer Associate

MBA INVESTMENT FUND, LLC, Austin, TX **2012 – Present**
Portfolio Manager
- One of thirteen students selected to actively manage value and growth portfolios with total AUM of $17 million
- Conducted fundamental research on energy, industrial, and materials stocks by building valuation models and presenting investment ideas to fund advisors

RAYTHEON, SPACE & AIRBORNE SYSTEMS Dallas, TX **2009 - 2012**
Financial Analyst (Clearance – Secret/SAR)
- Managed all financial reporting, budgeting, cost tracking, and EVMS reporting on SPY3 RF Head Radar System (Zumwalt ship) and critical proprietary missile programs with $200M budget
- Collaborated with RTN Engineers to develop product and factory cost models for use in proposals, cost forecasting, conducting sensitivity analysis, and sub-assembly make/buy decisions
- Assisted management and Program Manager in preparation of quarterly "Estimate At Completion" and proactively managed program budget and schedule challenges
- Delivered monthly program status, revenue, and cost presentations to upper-level management
- Spent 3 months at RTN Space & Airborne Systems HQ training other analysts and standardizing finance processes to increase annual operating plan and revenue forecasting accuracy; improved business unit forecast accuracy by 30%
- Received company Six Sigma Specialists certification for project consolidating new-hire training information; reduced new–hire training expenditures by ~ $100K/year

SMU HONORS PORTFOLIO PRACTICUM, Dallas, TX **2008 - 2009**
Telecommunications Sector Manager
- Honors student selected to be part of team to manage live portfolio of $3M

ROCKWOOD INVESTMENT PARTNERS, Dallas, TX **Summer 2008**
Equity Research Associate
- Generated financial forecasts for 50+ corporations ranging from retail to industrials
- Reviewed financial statements including 10-Ks, 10-Qs, proxies, and press releases and authored synopsis reports utilized by managing partners to evaluate portfolio investments
- Conducted in-depth due diligence on several retail establishments and an online education provider
- Spearheaded small research projects to determine key variables for financial forecasts

ADDITIONAL

- Chartered Financial Analyst (CFA) Level 3 Candidate
- SMU Young Alumni Board Member
- Lacrosse, water sports, golf, tennis, & personal fitness enthusiast
- **Work Eligibility:** Eligible to work in the United States with no restrictions