

# Jonathan Chavez

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## Education

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### University of Nebraska at Omaha

Bachelor of Science in Business Administration

Anticipated Graduation: May 2026

Concentrations: Banking & Financial Markets, Investment Science & Portfolio Management

## Professional Experience

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### TD Ameritrade, Omaha, NE

*Investment Services Intern*

February 2022-present

- Lead team project and engineer in the construction of a website to be presented to senior management
- Assist customers with navigating the TD Ameritrade website as well as TD Ameritrade's advanced trading platform
- Analyze past market data such as prices and volume to forecast the direction of equity prices using technical analysis
- Collaborate with eight investment services team members
- Develop investment strategy using derivatives to compete in the TD Ameritrade Spring 2016 Investment Competition

### First National Bank, Omaha, NE

*Teller*

December 2020-December 2021

- Assisted customers with deposits, withdrawals, payments and cash orders in a friendly and courteous manner
- Exercised due diligence on customer accounts to identify fraudulent activity to prevent potential losses to the bank
- Recommended products to existing and potential customers in support of client acquisition and sales goals

## Leadership

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### Maverick Investment Program, University of Nebraska at Omaha

*Senior Portfolio Manager*

August 2022 -present

- Performed and presented stocks using security analysis by conducting fundamental, bottom-up investment research and analysis of individual companies in multiple economic sectors
- Actively participated in investment program discussions to improve the overall quality of our programs research and \$700,000 value-oriented equity portfolio
- Maintained research and industry coverage in addition to monitoring and reporting on existing security holdings for assigned companies

### Quinnipiac G.A.M.E. VI Forum, New York, NY

*Competitor*

April 2020

- Represented the University of Nebraska at Omaha in investment competition against 140 colleges and universities
- Presented on the current state of the Maverick Investment portfolio, which beat the market from 2014-2015 by 6%

## Continuing Education

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### Genius of Warren Buffett Executive MBA Course

University of Nebraska at Omaha

April 2021

- Performed valuation analysis on a wide range of public and private entities within various industries using fundamental, bottom-up investment research
- Designed business valuation models that may have been used by Warren Buffett using discounted cash flow, precedent and comparable company analysis
- Prepared and presented a stock in the final Genius of Warren Buffett Business Valuation Challenge which met Berkshire Hathaway's investment criteria

## Honors & Awards

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Beta Alpha Psi Member, Fall 2015-present

Pathway Scholarship Award Recipient, Fall 2015-present

Presidential Scholarship Award Recipient, Fall 2014-present

Chancellor's List, University of Nebraska at Omaha, Fall 2014-Spring 2016

Texas School of Protocol Business Etiquette Course, Spring 2016