Jonathan Chavez

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# Education

## University of Nebraska at Omaha

*Bachelor of Science in Business Administration* Anticipated Graduation: May 2024

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

# Professional Experience

**TD Ameritrade**, Omaha, NE

*Investment Services Intern* February 2022-Present

* Lead engineer for a team project 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 to produce trading recommendations for senior traders
* 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

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

*Senior Portfolio Manager* August 2022 -May 2023

* 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 the program’s 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 2023

* Represented the University of Nebraska at Omaha in an investment competition against 140 colleges and universities
* Presented on the state of the Maverick Investment portfolio, which beat the market from 2021-2022 by 6%

# Continuing Education

## Genius of Warren Buffett Executive MBA Course

University of Nebraska at Omaha June 2023

* Performed valuation analysis on a wide range of public and private entities within various industries
* 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

Beta Alpha Psi Member, Fall 2021-Present

Pathway Scholarship Award Recipient, Fall 2021-Present Presidential Scholarship Award Recipient, Fall 2020-Present

Chancellor’s List, University of Nebraska at Omaha, Fall 2022-Spring 2023 Texas School of Protocol Business Etiquette Course, Summer 2023