

Maxfield Jones

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EDUCATION

University of Massachusetts Amherst | Commonwealth Honors College Amherst, MA
Isenberg School of Management

Master of Finance: Specialty in Real Estate

Candidate, September 20XX

Cumulative GPA: 4.0

Bachelor of Business Administration in Finance | Financial Analyst Track

May 20XX

Cumulative GPA: 3.8; Deans List all semesters

PROJECTS

MassMutual Venture Fund Capstone Project

Fall 20XX

- Performed market and company analysis of a consumer staples start-up in a team of four peers for Project Manager
- Implemented valuation modeling and conducted due diligence
- Adhered to principles of Impact Investing as a primary factor in analysis
- Developed a comprehensive investment memo outlining the keys investment details and company profile

Derivatives Portfolio Management

Fall 20XX

- Constructed an Enhanced Index Portfolio that traded options on QQQ which provided higher risk-adjusted returns
- Optimized portfolio to receive the volatility risk premium while reducing risk to generate alpha by strategically selling out of the money strangles which are a combination of puts and calls that produce a higher premium price
- Generated 14.25% total return, 9.74% alpha, a Sharpe Ratio of .63 compared to benchmark which produced 6.62% returns
- Presented ongoing performance of the fund and overall strategy in a report presented to fellow peers and faculty

EXPERIENCE

Brownstone, LLC

Boston, MA

Investments Intern

May 2019 – September 20XX

- Served as a financial intern supporting the CEO of an SEC - Registered Investment Advisor firm
- Researched investment portfolios, evaluating performance of mutual funds using Morningstar independent investment research and the Bloomberg terminal
- Identified opportunities to broaden the firm's client base, targeting millennials and investors interested in Environmentally, Socially, and Governmentally responsible investing

Commonwealth Valuation

Franklin, MA

Valuations Intern

May 2018 – May 20XX

- Partnered with business brokers to conduct financial appraisals of small businesses with ~\$1 million in revenue
- Analyzed financials of companies to be sold and provided valuation assessments for potential buyers
- Participated in sales presentations to potential buyers and assisted in over 30 small business acquisition deals

EXTRACURRICULAR EXPERIENCE

Minutemen Fixed Income Fund

Amherst, MA

High Yield Analyst

January 2017 – May 20XX

- Performed in-depth analysis on high-yield corporate bonds in the energy sector by following industry trends
- Participate in tri-weekly meetings which include lessons on credit analysis, and discussions on research and market updates
- Utilized Bloomberg Terminal, SEC filings, earning calls, and sell-side research to produce comprehensive credit reports
- Analyzed macroeconomic trends and bond market research to formulate and present investment recommendations

EY Inclusive Leadership Summit Case Competition

Amherst, MA

Competitor

October 20XX

- Engaged in learning regarding Diversity, Equity and Inclusion in corporate America with firm representatives
- Collaborated with team to formulate strategy for presenting ideas for African expansion of new products

SKILLS

Technology: Proficient with: Bloomberg, Python, R, Advanced MS Excel and Power BI, STATA, SQL, Tableau, Financial Modeling, Monte Carlo Simulations; Python: programming fundamentals: iteration, conditioning, functions,

NumPy, Pandas, Matplotlib, Seaborn, Statsmodels, Scikit-learn and Jupyter/Colab notebooks

Certifications: Upon MFAI completion CAIA Level 1 Exam Waived