

Jonathan Assez

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EDUCATION

Bernard M. Baruch College, City University of New York

Bachelor of Business Administration

New York, NY

Expected May 2028

- **Major:** Finance | **Intended Minor:** Computer Science
- **Relevant Coursework:** Principles of Accounting, Business Statistics, Microeconomics

SUNY Old Westbury College

Bachelor of Business Administration (BBA)

Long Island, NY

August 2024 - June 2025

- Cumulative GPA: 3.85/4.00

PROFESSIONAL EXPERIENCE

JP Morgan Chase

Associate Banker

Long Island, NY

December 2025 – Present

- Analyze the financial needs of 15-20 clients daily, offering tailored solutions to optimize financial outcomes
- Conduct account reviews to identify opportunities for financial improvement and additional product offerings
- Leverage my finance knowledge to drive 7-10 qualified referrals per week through client engagement

CitiBank

Teller

Long Island, NY

July 2025 - October 2025

- Managed more than \$100,000 in daily cash supply and performed banking transactions with 100% accuracy
- Collaborated with branch bankers to deliver high quality client experience and meet client needs effectively
- Supported daily operations by translating for 150+ clients customers between Spanish, French, Creole

Macy's

Sales Associate

Long Island, NY

July 2024 - August 2025

- Managed \$60 000 weekly cash supply with strict adherence to internal cash control procedures
- Increased credit card enrollment by 133% by converting client interactions into 40 new credit card accounts
- Rated in the top quartile for excellent customer service, hospitality and sharp problem-solving skills

Leadership and Involvement

TAMID Group at Baruch College

Investment Fund Analyst

New York, NY

September 2025 - Present

- Apply financial analysis and valuation techniques to analyze public company performance and growth
- Value companies via Excel to create discounted cash flow analysis and comparable company analysis models

Baruch Wall Street Club

Member

New York, NY

September 2025 - Present

- Network with professionals in the financial industry to gain insights on best practices
- Participate in workshops and develop technical skills in financial modeling and market analysis

CERTIFICATES

Bank of America

Investment Banking Virtual Experience

Forage

Issued December 2025

- Developed three-statement financial models for a potential M&A target with projections and scenarios analysis
- Analyzed Webflix's financials to assess business performance and identify potential M&A opportunities
- Built a discounted cash flow model to evaluate Nintendo's valuation and acquisition potential for Webflix

Bloomberg

Bloomberg Market Concept

(BMC)

Issued December 2025

- Leveraged Bloomberg Terminal to research markets and to screen equities and fixed income securities
- Built strong foundation in macroeconomic indicators, monetary policy, and global capital markets
- Applied valuation concepts to deepen understanding of how market moves impact equity and debt instruments

SKILLS & INTEREST

- **Technical Skills:** Bloomberg Terminal, S&P CapitalIQ, Microsoft Suite (Excel, Powerpoint)
- **Languages:** Fluent in Spanish, French, and Creole
- **Interest:** Advanced Flutist, Flute Jazz, Classical Music, Soccer, Traveling
- **Specialized Courses:** Wall Street Prep - Financial Modeling, Financeable -Valuation and M&A Fundamentals