

Jackson Pell

843-749-9802

Summerville, SC

pelljs@wofford.edu

Education

Wofford College, Spartanburg, SC

July 2019 - May 2023

Majors: Finance (GPA: 3.96) and Accounting (GPA: 3.87)

Total GPA: 3.73

Academic Honors: Dean's List (5x), Wofford Merit Scholarship, Marvin L. Holloway Scholarship

Experience

James-Atkins Student-Managed Investment Fund, **Managing Partner**

May 2022 – Present

- Direct four portfolios in a unified direction to maximize growth of the fund's assets (>\$390k)
- Organize regular fund meetings and catered special events with guest speakers
- Guide portfolio managers on evaluation methods and presentations as needed
- Arrange marketing/recruiting efforts to grow the pool of qualified applicants for next year's fund

Kyle Atkins Financial Group, **Intern**

June 2021 - August 2021, January 2022 - Present

- Create and implement a new client acquisition plan based on analysis of the firm's efficiency data
- Join daily client meetings discussing personal retirement portfolio performance
- Integrate and train staff on new automated software programs into the firm's current workflows
- Engage in regular investor team meetings to discuss market outlook and investment strategies
- Participate in weekly meetings and phone calls with Financial Wholesalers from various firms

James-Atkins Student-Managed Investment Fund, **Portfolio Manager**

May 2021 – May 2022

- Oversaw analysis of domestic equity and real estate investments using fundamental analysis
- Led research and preparation for the real estate portfolio's monthly presentations
- Generated prospective investment opportunities for the portfolio to further evaluate

James-Atkins Student-Managed Investment Fund, **Research Associate**

August 2020 - May 2021

- Researched domestic equity and fixed income securities in capital markets
- Evaluated potential investments using discounted cash flow and dividend discount models
- Improved public speaking skills through monthly presentations and regular meetings

Morningstar Properties, **Office Associate**

May 2020 - August 2020

- Performed daily sales calls to prospective clients and collection calls to past due tenants
- Solicited and facilitated multiple unit lease agreements to new tenants daily
- Completed weekly financial performance, property management, and business operations reports

Collegiate Extracurriculars

NCAA Division I Football Offensive Lineman

July 2019 - August 2020

- Maintain academic success with 25+ hours of practice, travel, and games weekly
- Study film and train to exceed team expectations
- Adapt to a high pressure and extremely competitive nature

Skills and Interest

- Proficient in Excel, PowerPoint, Bloomberg Terminal, Word, Canva, and Wix
- Avid MMA and football fan, frequent reader of instructional and self-help books
- Read and analyzed the entirety of Tolstoy's *War and Peace*
- Participated in a month-long public speaking class where I wrote and presented a TED Talk, professional interview, short forum speech, podcast interview, and more