

# Philip M. Reagan

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**EDUCATION** **Masters of Science in Finance Degree.** Warrington College of Business, University of Florida; Gainesville, FL

- Current student
- Expected graduation date: May 2008

**Bachelors of Business Administration Degree.** Stetson University; Deland, FL

- 3.8 Major GPA; 3.4 Overall cumulative GPA
- Multiple Deans List for years 2002, 2003, 2004
- Selected as Trustee for the National Award Winning *Roland George Investment Program*
- Selected as a member of the prestigious *Prince Entrepreneur Seminar Program*

## WORK

**EXPERIENCE** **JPMorgan Private Bank.** Sr. Banking Analyst. Palm Beach, FL

January 2005 – July 2007

- Series 7 & 63 licenses
- Partnered with senior investment professionals in providing holistic wealth management advice for over \$9.5 billion in assets under supervision
- Analyzed client balance sheets and investment vehicle correlations to provide optimal asset allocation analysis
- Prepared a vast array of investment reports and presentations that helped our clients efficiently transfer wealth to next generation through wealth strategies such as GRATs, CRATs, CLATs, and QPRTs
- Utilized proprietary wealth projection models that enabled clients to maximize investment returns while understanding the impact of taxes, spending, and concentrated stock positions on their net worth
- Presented custom analyses that I prepared with team members to my client base
- Trained, mentored and served as a liaison with management for the Florida analyst team

**Branch Banking & Trust Co.** Relationship Banker II. Naples, FL

July 2004 – January 2005

- Responsible for initiating, developing, and managing long term, profitable relationships with current and prospective clients
- Served as the primary contact and account manager to the clients

**INTERNSHIPS** **KCM Capital Asset Management, Inc. A Financial Hedge Fund Co.** Intern. Deland, FL

August 2003 – May 2004

- Responsible for creating and updating daily financial ledgers for the traders
- Learned hedging techniques, strategies, and general concepts in the financial markets
- Assisted with day trading strategies

**Bryant Miller & Olive P.A. Law Firm.** Summer Intern. Tampa, FL

May 2003 – August 2003

- Shadowed municipal bond lawyers on a day to day basis
- Assisted in bond closings, depositions, and research
- Analyzed the financial component of offering statements and general proofing of documents

## COMPUTER SKILLS

**Electronic Business Technology Program.** Stetson University; Deland, FL

- Experienced with Bloomberg, Baseline, Reuters Bridge, Morningstar Financial Software
- Proficient in Spreadsheet Analysis; Minitab, Excel, including macros
- Proficient in Microsoft Office (Word, Access, Excel, & PowerPoint)
- Proficient with Flash, Dreamweaver, Fireworks, Forte, and Visual Studio software