



## **Jake Cooper**

- **Type of analytical activity:** investment planner, strategic development department;;

- **General competence:**

- Creation of mathematical and financial models of the market, return on investment, demand, elasticity, pricing;
  - accounts under management - 51;
  - investment portfolios in progress - 18;
    - pamm accounts - 4;
  - staking funds under management - 7;

- **Capital in management: \$17.6 million.**

- **Professional experience::**

Experience in analytical activities: 13 years;

- 3.5 years of partner activity in XYZ Limited / Administrative Support

- 2.5 years in ABC Industries Limited / Administrative Assistant

- 2.5 years of activity in the insurance organization / FOUR POINTS CAPITAL PARTNERS LLC (CRD#:43149)

- 4.5 years of activity NEXBANK SECURITIES INC (CRD#:133267) : financial adviser

- **Education:**

2009–2013 Northwestern University  
Bachelor of Science in Business

- **Qualification:**

State Securities Law Exam

Series 63 - Uniform Securities Agent State Law Examination

SIE - Securities Industry Essentials Examination

Series 7TO - General Securities Representative Examination

Series 7 - General Securities Representative Examination