

## **Jacob Shafer**

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### **EDUCATION**

**CHAPMAN UNIVERSITY, GEORGE L. ARGYROS SCHOOL OF BUSINESS & ECONOMICS**

**Orange, CA**

**Bachelor of Science, Finance Emphasis**

*May 2018*

- Relevant Coursework: Investments, Portfolio Management, Derivatives and Fixed Income Securities
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### **EXPERIENCE**

**INNOVATIVE LEASE SERVICES**

**Carlsbad, CA**

***Business Development Manager***

*July 2019 – August 2020*

- Assisted select clients with working capital financing for general growth
- Targeted neighborhood vendors to cultivate more receptive, local clientele
- Effectively grew lessee's business via asset acquisition and/or capital injection
- Consulted clients on expansion and diversification strategies and provided in-depth analysis on options
- Worked closely with management to develop funding strategies tailored to individual accounts
- Developed specialized working capital strategies with several top funding partners around the country

**VENPRO PARTNERS LLC**

**Encinitas, CA**

***Business Development Analyst/Credit Manager/Marketing Manager***

*July 2017 – July 2019*

- Reviewed financial documents and prepared detailed credit-file including analyst recommendation on potential funding sources
- Directed individual originations and lead generation to help connect with clients on an interpersonal level
- Scheduled and directed qualifying calls to best determine client viability
- Worked actively with lending partners to structure terms in a flexible manner to meet client needs
- Maintained opportunity and partner databases for quick, easy access to information
- Operated remotely from home-office with very limited support from the firm
- Developed and adapted various marketing campaigns aimed at Early-Series/Seed businesses
- Sourced and Qualified a nine-figure funding opportunity with a breakthrough biotech firm - Generating a six-figure return for the firm

**FOCUS INVESTMENT ADVISORS**

**Carlsbad, CA**

***Advisor Assistant***

*April 2016 – September 2016*

- Worked with advisors on discerning best investment strategy for given accounts
- Participated in client meetings to help document and understand client needs
- Brought internal documentation into compliance via in-depth review and revision
- Reviewed financial models to find discrepancies and errors to insure highest portfolio returns

**VITAL THERAPIES, INC**

**Rancho Bernardo, CA**

***Summer Intern***

*May 2015 – September 2015*

- Acted under the direct supervision of both CFO and CTO
  - Assisted with the review and authorization of all incoming and outgoing checks
  - Provided crucial support to intra-departmental compliance projects in regards to patients' personal information and medical records.
  - Wrote and edited the updated IT compliance manual for 2016
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### **LEADERSHIP & INVOLVEMENT**

**STUDENT MANAGED INVESTMENT FUND, CHAPMAN UNIVERSITY**

***Member***

- Utilized Bloomberg terminals to watch market trends and track equities
  - Prepared an in-depth presentation on annual Federal spending
  - Worked alongside fellow students to value and select securities for investment
  - Analyzed and reported on portfolio growth for the year, leading to a record return on the SMIF for 2017
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### **SKILLS & INTERESTS**

**Language:** English (Fluent), French (Read, Write)

**Computer:** Microsoft Office Suite, Adobe, BMC Certified, Numerous CRM

**Interpersonal:** Excellent communication, teamwork, outgoing, determined, enthusiastic

**Financial:** Working Capital Financing, Equipment Financing, Intra-Series Funding, Acquisition and Valuation

